# Research Report

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# AUTOMOTIVE AFTERMARKET 1984:

# A STUDY OF PRIMARY CAR MAINTAINERS

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New York, N.Y. 10036

December 1984

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc. as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

The study design and report were the responsibility of Albert E. Gollin and Michele Nassberg of NAB's Research Department.

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# INTRODUCTION

## The Automobile Industry--Dimensions and Trends

The automobile industry is doing well these days, which is good news for the American economy. The industry has cut production costs and improved plant efficiency. Production in 1984 grew substantially: for the first eleven months, U.S. car production soared to 7.3 million units, up from 6.3 million units for the same period in 1983. It has been the best year since 1979, when 8.4 million cars were built in the U.S. (Table 1).

Table 1: U.S. Domestic Car Production

| | Jan. 1-Dec. 3 1983 | | Jan. 1-Dec.1 1984 | |
|---|---|---|---|---|
| | units | % total | units | % total |
| General Motors | 3,710,214 | 59% | 4,088,046 | 56% |
| Ford | 1,436,639 | 23 | 1,661,596 | 23 |
| Chrysler | 824,134 | 13 | 1,165,033 | 16 |
| American Motors | 183,576 | 3 | 177,264 | 2 |
| Volkswagen | 90,008 | 1 | 69,236 | 1 |
| Honda | 48,420 | 1 | 127,673 | 2 |
| Total U.S. cars | 6,292,991 | 100% | 7,288,848 | 100% |

Source: Automotive News, Dec. 1984

## Sales Trends

The six major U.S. automakers sold 7.9 million new passenger cars in the 1984 model year (which ended Sept. 30), up 22.4 percent from 6.5 million sold

in 1983. Domestic and foreign automakers sold about 10.3 million cars overall in the 1984 model year, 17 percent over the 8.8 million a year earlier and the best since 1979. Foreign car makers sold a record number of cars--2.4 million. But foreign share of the U.S. auto market was only 23 percent, compared with 1983's 27 percent. This year has been the lowest for foreign cars in five years, due to import restrictions and sales growth by U.S. companies.

The 1985 model year sales of domestic and imported cars are expected to reach around 10.5 million. Uncertainty persists because of the threat of increases in interest rates (which depress "big ticket" item purchases), slower economic growth, and slower growth in disposable personal income.

## Expenditure Trends

Consumers paid $65 billion for new cars in 1983 and $25.7 billion for used cars. In addition, $91 billion was spent on fuel, slightly less than the previous year. (Table 2). Prices paid for new cars averaged $10,530 in 1983, up 53% from the $6,861 average in 1979.

Table 2: Personal Consumption Expenditures (in billions)

| | 1978 | 1980 | 1982 | 1983 |
|---|---|---|---|---|
| New autos | $48.2 | $46.3 | $52.9 | $65.1 |
| Used autos | 14.9 | 15.5 | 21.0 | 25.7 |
| Tires, tubes, and accessories and parts | 14.7 | 18.9 | 21.6 | 23.5 |
| Repair, greasing, washing, parking, storage, and rental | 28.1 | 32.3 | 37.5 | 38.4 |
| Gasoline and oil | 51.2 | 84.8 | 91.5 | 90.8 |

Sources: U.S. Bureau of Economic Analysis and Survey of Current Business.

## Cars and Drivers

Currently about 162 million motor vehicles are registered in the United States: 125 million passenger cars, and 37 million trucks and buses. The average car on the road is 7.2 years old, nearly a year older than in 1979, and older than at any time since 1950. To keep car costs in line with income, people are holding onto cars longer. Higher car prices are not the only problem drivers face. Increases in interest, insurance, licensing, maintenance, repair, and fuel costs are additional factors encouraging people to hold onto older cars. The average car travelled 9,167 miles, averaging 16.3 miles per gallon.

Families today own fewer cars than before. According to Data Resources Inc., multiple-car family ownership has declined from the record 1978 average of 1.22 cars per family to 1983's 1.17, the lowest reading in twelve years.

More than 152 million people are licensed to drive motor vehicles in the U.S. Men account for 79.5 million or 52 percent of licensed drivers. Women comprise 48% of licensed drivers, 30% of registered owners of domestic cars, and 43% of domestic car principal drivers.

## The Automotive Aftermarket

In 1983, the auto service and parts market accounted for just over $83 billion. Approximately $28 billion was spent on service labor, $40 billion on parts and accessories, and $15 billion on tires. Shown below is a breakdown of aftermarket sales by outlet (Table 3).

New car dealerships' disproportionately large share (30%) of the automotive service and parts business reflects their dominant role when it comes to more difficult, expensive repair work, as well as their larger facilities.

Table 3: Auto Repair Facilities Market (1983)

| Outlet | Total service and parts market (billions) | % of market | Number of facilities | % of repair facilities |
|---|---|---|---|---|
| Franchised new car dealerships | $25.1 | 30% | 24,725 | 8% |
| Auto repair shops (independent & franchised) | 23.1 | 28 | 180,000 | 60 |
| Tire, battery and accessory dealers | 17.6 | 21 | 20,000 | 7 |
| Gasoline service stations * | 7.8 | 9 | 70,000 | 23 |
| Mass merchandisers | 7.6 | 9 | 2,800 | 1 |
| All other service outlets | 2.0 | 3 | 1,500 | 1 |
| TOTAL | $83.2 | 100% | 299,025 | 100% |

*Includes only those outlets that perform significant repair work (i.e., that perform work beyond simple oil changes or lube jobs that receive at least 2% of total dollar revenue from service work.)

Sources: NADA Industry Analysis Department and U.S. Bureau of Census

The number of auto parts stores in the United States increased by an impressive 33 percent since 1980, to 38,000. In contrast, the number of tire stores, service stations, and new car dealers selling auto products has decreased, as shown below in table 4.

In total, APAA reported 518,700 U.S. retail outlets in 1983, 30 percent of which sold auto parts. Specialty repair shops (such as tune-up and quick lube centers) and drug stores or independent garages selling car parts and products showed the greatest growth in 1983. Consumer demand for specialized assistance with their cars has created a stronger position for these outlets in the automotive aftermarket.

Table 4: Number of Outlets Selling Auto Products

| Store type | 1980 | 1983 | % change |
|---|---|---|---|
| Auto repair and service outlets other than service stations | 137,800 | 156,400 | +17 |
| Service stations | 150,100 | 130,100 | -13 |
| Grocery stores | 83,600 | 85,100 | +2 |
| Auto parts stores | 28,600 | 38,000 | +33 |
| New car dealers | 29,800 | 26,700 | -10 |
| Hardware stores | 17,800 | 18,200 | +2 |
| Drug stores | 13,400 | 15,000 | +12 |
| Tire stores | 14,800 | 12,200 | -18 |
| Discount stores | 6,900 | 7,000 | +1 |
| Variety stores | 5,900 | 5,300 | -10 |
| Department stores | 2,700 | 2,500 | -7 |

Source: Automotive Parts and Accessories Association (1984)

## Gasoline Stations

Since 1980, the number of gas stations has declined 13.3% (Ad Age, June 21, 1984). With the advent of self-service, fewer gas stations actually service automobiles or even sell parts. Self-service now accounts for 72% of all gasoline sales compared with 5% in 1972.

## Advertising

The automotive industry spent a total of $433.4 million in 1983 for national advertising in newspapers, an increase of 7.3% over the prior year. Ads for passenger cars take the largest share of newspaper advertising, accounting for $326.3 million of the total investment.

Table 5: 1983 National Advertising Investments in Newspapers

| AUTOMOTIVE | 1983 | 1982 | % change |
|---|---|---|---|
| Gasoline & oil companies | $ 18,770,000 | $ 22,975,000 | -18.3 |
| Leasing & rentals | 50,115,000 | 36,601,000 | +36.9 |
| Parts, accessories & supplies | 13,326,000 | 11,303,000 | +17.9 |
| Passenger cars (new) | 326,332,000 | 312,279,000 | +4.5 |
| Trucks, trailers & mobile homes | 22,730,000 | 19,561,000 | +16.2 |
| Automotive not elsewhere classified | 2,088,000 | 1,250,000 | +67.0 |
| AUTOMOTIVE TOTAL | $433,361,000 | $403,969,000 | +7.3 |

Source: Media Records

This substantial investment makes the automotive aftermarket industry a key customer for newspapers. To help them reach the customers for their products and use newspapers more effectively as a medium for their advertising, NAB has sponsored this survey of primary car maintainers.

Survey of Primary Car Maintainers

Early in 1984, The Gallup Organization was commissioned to conduct a telephone survey with a nationally representative sample of primary car maintainers in 1,202 car-owning households.[1] Eligibility was determined by asking to interview "the person who usually decides when and where your car is repaired or serviced." Interviewing was further restricted to adults between the ages of 18-64. Thus, this is a nationally representative sample

[1] Field work was conducted between Jan. 24 - Feb. 4, 1984. Weighting of the data by region was employed. The numbers of weighted and unweighted respondents in various demographic groups are shown in Appendix table D.

of self-acknowledged, "primary car maintainers" of one or more cars in car-owning households, rather than the more conventional national sample of adults 18 years of age and older.[1]

These criteria of eligibility were adopted after consultation with representatives of dealers and manufacturers of automotive aftermarket products, in order to gain a clearer picture of key decision-makers among their customers: those whose attitudes and actions largely define the mass market. Questions used in an NAB survey in 1974 were augmented by others developed in response to changing market conditions, in order to develop timely information on the perceptions and behavior of prime prospects for auto aftermarket products.[2]

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[1] A technical report by The Gallup Organization that contains sampling and data processing information is available from NAB's Research Department.

[2] A copy of the survey questionnaire is included in the Appendix to this report. Further details on the survey's findings are available from NAB's Detroit office or the Research Department in New York City.

## PRIMARY CAR MAINTAINERS AND CAR CARE

The relationship of consumers to their cars is changing rapidly as American households undergo changes. More women are working and people are becoming more self-reliant in buying gasoline and in caring for their car.

The proportion of women who identify themselves as usually making car repair and maintenance decisions is larger today than ever before. Two out of five (39%) people in our sample of "primary maintainers" (PMs) are women. (Table 6) The increasing number of women responsible for at least one car in the home is having an impact on the automotive aftermarket. As a result, advertising of products need no longer be primarily geared toward men, nor should it appear only in male-oriented media.

PMs are better than average newspaper readers: 71 percent read a daily paper yesterday, and 72 percent did so on the preceding Sunday, compared with an average readership of 67 percent weekdays and Sundays.

Two out of three primary maintainers do some car maintenance and repair work on their own. They will be called "do-it-yourselfers" (DIYers). About half (32 percent of all PMs) say they do minor maintenance, such as changing oil or anti-freeze, and 34 percent say they do major repairs or practically all needed maintenance work, that is, engine tune-ups or installation of parts such as spark plugs, car batteries, or mufflers. Only about one-third of the PMs do not do any repair or maintenance work by themselves, relying instead on service facilities or others in their households.

More than three out of five (62%) PMs have two or more cars in their household. Only one-quarter (26%) of primary maintainers purchased a new car within the past three model years.

**Table 6: Profile of Primary Maintainers**

| | |
|---|---|
| **Sex:** | |
| Male | 61% |
| Female | 39 |
| **Age:** | |
| 18-24 | 11 |
| 25-34 | 33 |
| 35-44 | 23 |
| 45-54 | 15 |
| 55-64 | 17 |
| **Household income:** | |
| under $15M | 17 |
| $15M-$24.9M | 26 |
| $25M-$34.9M | 25 |
| $35M + | 32 |
| **Education:** | |
| some college + | 52 |
| high school grad | 36 |
| less than high school grad | 11 |
| **Marital status:** | |
| married | 64 |
| divorced, separated, widowed | 17 |
| single (never married) | 19 |
| **Employment:** | |
| employed | 77 |
| not employed | 23 |
| **Occupation (selected):** | |
| professional/managerial | 12 |
| clerical/sales | 10 |
| craftsman/foreman | 14 |
| **Region:** | |
| East | 23 |
| Mid-West | 26 |
| South | 31 |
| West | 20 |
| **City size:** | |
| metro | 30 |
| suburbs | 36 |
| non-metro | 34 |
| **Newspaper readership:** | |
| read yesterday | 71 |
| frequent reader (4-5 days) | 66 |
| infrequent reader (0-3 days) | 34 |
| Sunday reader | 72 |
| **Do-it-yourself:** | |
| do major repairs, maintenance | 34 |
| do minor repairs, maintenance | 32 |
| non do-it-yourselfer | 34 |
| **Number of cars in household:** | |
| one | 38 |
| two | 40 |
| three + | 22 |
| **New car purchasers (1982-84 models):** | 26 |
| **Base:** Total primary maintainers = 100% | (1,202) |

**Question:** Are you the person who usually decides when and where your car is repaired or serviced?

Car Maintenance Practices and Attitudes

Almost half (48%) of the primary maintainer sample bring their cars in for regular check-ups. About one-third (35%) bring it in for servicing only when something goes wrong; the remainder do checkups themselves (Table 7). Women and older people are more likely to bring it in for servicing at regular intervals. Younger PMs are somewhat likelier to service their car only when something is wrong. People with less education or lower income also tend to wait till a repair or adjustment is needed. But non-DIYers are very concerned about keeping their car in good working condition: seven out of ten bring their car for regular check-ups. Similarly, those who recently purchased a new car that may still be under warranty or service protection plans tend to service their cars regularly more often than the average PM.

No one type of service outlet dominates the market: New car dealers and garage/repair shops are each mentioned by about one-third of those whose cars are serviced by someone. Only one out of five PMs say that they usually bring their car to a gas station. In a 1974 auto aftermarket study conducted by the Newspaper Advertising Bureau solely with male car owners, one-third of the men reported using gasoline stations as their usual service place. Now only one man in five uses them. The past dozen years have seen a sharp drop in the number of gasoline service stations, especially those that are independently owned. As a result, more car owners have had to find other means of getting their car serviced or learned to repair their own cars.

Those who are more upscale (i.e. higher education, income, and occupation) patronize car dealers more. New car owners are especially prone to use a new car dealer for servicing, often because their car remains under

Table 7: Regularity of Car Maintenance

| | Regular Intervals | Only when something is wrong | Do check-ups myself |
|---|---|---|---|
| Total PM sample: | 48% | 35% | 17% |
| Sex: | | | |
| Male | 41% | 35% | 24% |
| Female | 59 | 34 | 7 |
| Age: | | | |
| 18-24 | 38 | 46 | 16 |
| 25-34 | 40 | 37 | 23 |
| 35-44 | 49 | 34 | 17 |
| 45-54 | 58 | 28 | 14 |
| 55-64 | 57 | 31 | 12 |
| Household income: | | | |
| under $15M | 35 | 47 | 18 |
| $15M-$24.9M | 50 | 34 | 16 |
| $25M-$34.9M | 43 | 35 | 22 |
| $35M + | 55 | 30 | 15 |
| Education: | | | |
| some college + | 57 | 30 | 13 |
| high school grad | 41 | 38 | 21 |
| less than high school grad | 30 | 44 | 26 |
| Marital status: | | | |
| married | 44 | 36 | 20 |
| divorced, separated, widowed | 55 | 29 | 16 |
| single (never married) | 54 | 34 | 12 |
| Employment: | | | |
| employed | 48 | 34 | 18 |
| not employed | 46 | 37 | 17 |
| Occupation (selected): | | | |
| professional/managerial | 57 | 26 | 17 |
| clerical/sales | 59 | 30 | 11 |
| craftsman/foreman | 28 | 36 | 34 |
| Region: | | | |
| East | 54 | 33 | 13 |
| Mid-West | 45 | 37 | 18 |
| South | 45 | 33 | 22 |
| West | 51 | 35 | 14 |
| City size: | | | |
| metro | 51 | 35 | 14 |
| suburbs | 50 | 32 | 18 |
| non-metro | 42 | 38 | 20 |
| Newspaper readership: | | | |
| read yesterday | 51 | 33 | 16 |
| frequent reader (4-5 days) | 53 | 32 | 15 |
| infrequent reader (0-3 days) | 38 | 40 | 22 |
| Sunday reader | 52 | 33 | 15 |
| Do-it-yourself: | | | |
| do major repairs, maintenance | 19 | 35 | 46 |
| do minor repairs, maintenance | 53 | 43 | 3 |
| non do-it-yourselfer | 71 | 26 | 3 |
| Number of cars in household: | | | |
| one | 53 | 34 | 13 |
| two | 46 | 36 | 18 |
| three + | 43 | 33 | 24 |
| New car purchasers (1982-84 models): | 62 | 27 | 11 |

Question: Do you take your car in for check-ups or routine maintenance at regular intervals or only when you think something is wrong?

warranty or because of the confidence built through satisfactory warranteed work in the past.

Reasons for Choosing a Service Outlet

Better service and a generally good reputation are the two main reasons given for taking one's car to a usual place of service. Confidence in the staff's quality is another important reason, cited by one-quarter of the PMs (Table 8).

Table 8: Reasons for Having Car Serviced at a Particular Place*

| | |
|---|---|
| Better service | 34% |
| Good reputation | 32 |
| Like/know personnel | 26 |
| Less expensive | 14 |
| Good location | 14 |
| Other (car still under warranty, will guarantee work, better value, and other) | 25 |

Base: Those who have their car serviced (N)= (995)

Question: Why do you take your car to be serviced at this particular place?

* Adds to more than 100% due to multiple mentions. "Don't knows" (5%) were excluded.

Of the PMs who take their cars to a commercial outlet for service, 70 percent take it to the same place every time. There is little variation in this percentage among different PM demographic segments, e.g., men and women (Table 9).

Table 9: Take Car to Same Place for Service vs. Sometimes Go to Another Place

| | Total | Male | Female |
|---|---|---|---|
| Always same place | 70% | 68% | 73% |
| Sometimes another place | 26 | 27 | 25 |
| Don't know | 4 | 5 | 2 |

Base: Those who have their car serviced (N)= (995)

Question: Do you take your car to be serviced to the same place every time, or do you sometimes go to another place?

Garage/repair shops are mentioned as the "other" service facility by two out of five (39%) of those who sometimes go elsewhere, with gas stations (23%) and new car dealerships (19%) following in order of importance as alternative outlets. It is the promise of better service, convenience of location, or cost savings that motivates those who shop around.

## Gasoline Purchasing

Primary maintainers fall into two nearly equal groups: those who are "station-loyal," buying gasoline only at one specific station (48%), and those who shop around among several stations (52%). Women are slightly more inclined to stick to one gas station, as are non do-it-yourselfers.

The average gasoline station of today is not a full-service station as it was in the past. Self-service now accounts for 72 percent of all gasoline sales, compared with 5 percent in 1972. In our survey, 69 percent of the primary maintainers actually prefer self-service to attendant service. This is especially true of men, young people, westerners, and those who buy gasoline at several stations (Table 10).

Table 10: Gas Station Service Preference*

| | Self service | Attendant service | Doesn't matter |
|---|---|---|---|
| Total PM sample: | 69% | 25% | 6% |
| Sex: | | | |
| Male | 77% | 16% | 7% |
| Female | 56 | 40 | 4 |
| Age: | | | |
| 18-24 | 76 | 18 | 6 |
| 25-34 | 74 | 22 | 4 |
| 35-44 | 66 | 25 | 9 |
| 45-54 | 67 | 30 | 3 |
| 55-64 | 63 | 31 | 6 |
| Region: | | | |
| East | 50 | 41 | 9 |
| Mid-West | 72 | 23 | 5 |
| South | 74 | 19 | 7 |
| West | 80 | 18 | 2 |
| Do-it-yourself: | | | |
| do major repairs, maintenance | 84 | 11 | 5 |
| do minor repairs, maintenance | 71 | 21 | 8 |
| non do-it-yourselfer | 51 | 44 | 5 |
| Number of cars in household: | | | |
| one | 60 | 34 | 6 |
| two | 71 | 23 | 6 |
| three + | 81 | 15 | 4 |
| New car purchasers (1982-84 models): | 72 | 23 | 5 |

* "Don't knows" and "No self service in the area" (2%) were excluded.

Question: Do you prefer to fill the car yourself at a "self-serve" facility, or do you prefer to have it filled by an attendant?

Not surprisingly, those who choose to do their own car repair and maintenance work generally prefer to pump their own gasoline: five out of six major DIYers opt for self-service vs. only one-half of the non-DIYers.

As self-service gas typically costs a few pennies less, those with more cars (and thus more expenses) look for the savings. Eight out of ten (81%) PMs who own three or more cars prefer to pump gas themselves.

## AUTOMOTIVE PARTS BUYING

The automotive aftermarket is large not only in its dollar volume but also in the range of its products. This survey dealt with seven of them. Nearly all male PMs in this survey personally bought or replaced motor oil and oil filters within the past year. Seven out of ten bought spark plugs; nearly three out of five bought tires; two out of five replaced a battery, one out of four a muffler, and one in five a shock absorber. These figures are somewhat higher than the percentages for all male adults in the nation (as measured in various omnibus marketing surveys, e.g. SMRB), primarily because our sample is tilted toward the more active segment of aftermarket parts buyers (Table 11).

Table 11: Purchase of Seven Products in the Past Year
(based on total and selected primary maintainers)

| | Total PMs | Male | Female | Major DIYers | No. of cars in household: Two or more cars | No. of cars in household: One car |
|---|---|---|---|---|---|---|
| Motor oil | 95% | 96% | 94% | 97% | 96% | 95% |
| Oil filter | 89 | 92 | 84 | 96 | 91 | 84 |
| Spark plugs | 65 | 69 | 57 | 79 | 67 | 58 |
| Tires | 54 | 57 | 48 | 60 | 56 | 47 |
| Car battery | 37 | 40 | 33 | 42 | 39 | 34 |
| Muffler | 22 | 24 | 18 | 28 | 23 | 21 |
| Shock absorber | 18 | 21 | 13 | 23 | 19 | 16 |

Base: All PMs (for each product) under each heading.

Women PMs do not fall far behind when it comes to parts purchasing, especially the more often-replaced products such as motor oil and oil filters. Other demographic differences have only minor effects on the frequency of purchasing these products. But the amount of car work PMs do themselves has a significant impact on aftermarket parts purchasing. As expected, major do-it-yourselfers purchase all of these seven products more often than others, particularly the non-DIYers.

Not surprisingly, the more cars one owns, the wider the range of aftermarket products that are bought. Motor oil is an exception--almost all PMs, regardless of the number of cars owned, bought motor oil in the past year. New car purchasers, with less need to repair or replace automotive parts, are less likely than the average PM to buy parts: one-third less likely to buy tires, one-fifth less likely to buy spark plugs, and three-eighths less likely to buy batteries.[1]

Place of Purchase

Except for tires, bought by 53% at a tire company outlet, aftermarket products are bought at many places. No one type of outlet controls over half the market share for any other individual product. Among these sampled primary maintainers, department stores lead in selling motor oil and batteries; auto supply stores loom largest in the purchase of oil filters, spark plugs, mufflers, and shock absorbers. (Table 12).

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[1]The purchasing patterns for all seven aftermarket products by various demographic groups are shown in Appendix table A.

Table 12: Type of Outlet Where Each Part Is Most Likely to Be Purchased

| Replacement part | Outlet | | Base |
|---|---|---|---|
| Motor oil | Department store | 30% | ]- (1142) |
| | Auto supply store | 28% | |
| Oil filter | Auto supply store | 36% | (1068) |
| Spark plug | Auto supply store | 49% | ( 774) |
| Tires | Tire company outlet | 53% | ( 641) |
| Car battery | Department store | 36% | ( 441) |
| Muffler | Auto supply store | 34% | ( 273) |
| Shock absorber | Auto supply store | 39% | ( 217) |

Base: Number of PMs purchasing each part.

Installation of Purchased Parts

Three of the seven aftermarket products bought most recently were installed by one-half or more of the PM purchasers themselves. Motor oil, the easiest product to install, was added by 56%; oil filters and spark plugs were self-installed by approximately half of them, and batteries by about two-fifths (43%) (Table 13). Other products requiring special tools or facilities are more likely to be installed at the place of purchase. Almost one-half of the PMs (46%) who bought shock absorbers had them installed on the premises; more than one-half had mufflers installed (55%); and almost two-thirds (65%) of tire purchasers had the tires mounted where they were purchased. Women were significantly more likely to have parts installed by others, either at the place of purchase or by someone in their household.

Table 13: Who Installed the Parts?

| | (N) | By self | Installed where purchased | Other household member or someone else |
|---|---|---|---|---|
| Motor oil | | | | |
| Total | (1142) | 56% | 27% | 17% |
| Men | | 74 | 19 | 7 |
| Women | | 28 | 38 | 34 |
| Oil filter | | | | |
| Total | (1068) | 51% | 32% | 17% |
| Men | | 68 | 25 | 7 |
| Women | | 19 | 46 | 35 |
| Spark plug | | | | |
| Total | (774) | 50% | 31% | 19% |
| Men | | 66 | 26 | 8 |
| Women | | 18 | 42 | 40 |
| Battery | | | | |
| Total | (441) | 43% | 40% | 17% |
| Men | | 60 | 33 | 7 |
| Women | | 10 | 53 | 37 |
| Shock absorber | | | | |
| Total | (217) | 37% | 46% | 17% |
| Men | | 49 | 38 | 13 |
| Women | | 8 | 63 | 29 |
| Muffler | | | | |
| Total | (273) | 28% | 55% | 17% |
| Men | | 34 | 51 | 15 |
| Women | | 16 | 64 | 20 |
| Tires | | | | |
| Total | (641) | 18% | 65% | 17% |
| Men | | 25 | 62 | 13 |
| Women | | 6 | 73 | 21 |

Bases: All PMs who purchased each part.

Those who install automotive parts themselves are typically younger men, less educated, and in blue collar occupations. The more cars they own, the more likely they are to do the work themselves. Do-it-yourselfers are, as expected, the most likely of all PMs to install the parts they bought.[1]

## Specifying Brands

When purchasing parts for their cars, a substantial proportion of primary maintainers also specify the brand they want. This varies with the types of replacement part. Motor oil brands were specified by three out of five (59%) PMs. Brands of spark plugs and tires were specified by approximately one-half of the PMs, and batteries by slightly less than half (46%). Other replacement parts purchases seem to be less brand-sensitive: only about two out of five PMs specified brands of shock absorbers and oil filters, and less than one-third bought mufflers by name. And although women form a growing segment of the automotive market, they still fall consistently behind men when it comes to specifying replacement parts by brand name. (Table 14).[2]

## Seeking Information on Aftermarket Products

As we have seen, car maintainers are taking on a more active role at every stage in the repair and maintenance of their cars. But the job is becoming more difficult for them as consumers, due to the growing complexity and expense involved in car care. As a result, they place a high priority on the role of information in making decisions about car repair and servicing.

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[1] Additional details on self-installers are provided in Appendix table B.

[2] Additional details on brand-specifying by various demographic groups are shown in Appendix table C. In most cases, individual brands were identified by too few respondents to warrant more detailed analysis.

Table 14: Brand Specified When Purchasing Part

| | Specified brand | (N) |
|---|---|---|
| Motor oil: Total | 59% | (1142) |
| Men | 66 | |
| Women | 47 | |
| Spark plug: Total | 52% | (774) |
| Men | 62 | |
| Women | 33 | |
| Tires: Total | 50% | (641) |
| Men | 54 | |
| Women | 42 | |
| Battery: Total | 46% | (441) |
| Men | 50 | |
| Women | 40 | |
| Shock absorber: Total | 42% | (217) |
| Men | 46 | |
| Women | 31 | |
| Oil filter: Total | 41% | (1068) |
| Men | 50 | |
| Women | 26 | |
| Muffler: Total | 30% | (273) |
| Men | 31 | |
| Women | 25 | |

Bases: PMs who purchased each part.

What are their prime sources of information on the aftermarket products they may ultimately buy? The PMs in our sample were asked about tires and other replacement parts in parallel questions. By combining their answers, the role of newspapers as one source among others becomes more sharply defined.

First, among all information sources on replacement parts (other than tires), newspapers emerge as the one identified most often. Almost three PMs in ten (29%) mentioned the newspaper as a source for information on values and prices (Table 15). No other mass medium accounted for as much as

Table 15: Source of Information About Replacement Parts (Other Than Tires)[a]
(based on those who identified a source)

| | Newspaper | Personal contacts[b] | Dealer | Consumer reports/ consumers union | Other[c] |
|---|---|---|---|---|---|
| Total: | 29% | 24% | 23% | 11% | 25% |
| Sex: | | | | | |
| Male | 32% | 20% | 22% | 10% | 26% |
| Female | 23 | 30 | 24 | 12 | 23 |
| Age: | | | | | |
| 18-24 | 26 | 19 | 31 | 7 | 30 |
| 25-34 | 28 | 21 | 24 | 12 | 29 |
| 35-44 | 31 | 25 | 19 | 11 | 24 |
| 45-54 | 28 | 23 | 26 | 13 | 25 |
| 55-64 | 29 | 34 | 17 | 8 | 16 |
| Household income: | | | | | |
| under $15M | 24 | 29 | 30 | 7 | 24 |
| $15M-$24.9M | 26 | 26 | 24 | 10 | 24 |
| $25M-$34.9M | 30 | 22 | 19 | 15 | 25 |
| $35M + | 33 | 21 | 24 | 12 | 26 |
| Occupation (selected): | | | | | |
| professional/managerial | 26 | 20 | 28 | 15 | 19 |
| clerical/sales | 32 | 27 | 23 | 9 | 24 |
| craftsman/foreman | 33 | 24 | 27 | 7 | 25 |
| Region: | | | | | |
| East | 34 | 26 | 20 | 14 | 23 |
| Mid-West | 34 | 20 | 17 | 13 | 29 |
| South | 24 | 26 | 26 | 8 | 24 |
| West | 23 | 23 | 29 | 9 | 25 |
| Do-it-yourself: | | | | | |
| do major repairs, maintenance | 36 | 16 | 21 | 10 | 28 |
| do minor repairs, maintenance | 26 | 24 | 27 | 11 | 28 |
| non do-it-yourselfer | 23 | 33 | 22 | 11 | 18 |
| Number of cars in household: | | | | | |
| one | 26 | 30 | 22 | 12 | 21 |
| two | 31 | 20 | 23 | 10 | 28 |
| three + | 30 | 21 | 25 | 11 | 25 |

Question: If you were going to buy the other replacement parts we've talked about, such as motor oil, spark plugs, batteries, etc., and wanted to compare values and prices, where would you expect to find this information?

a "Don't knows" (no source given) omitted; for total primary maintainers sample they equal 20%. Multiple answers are included.

b "Personal contacts" include family, friends, mechanics, etc.

c "Other sources" includes: yellow pages (8%), shop around (8%), magazines (4%), television (1%), radio (1%), and other (3%).

5 percent of all sources mentioned. "Word-of-mouth" information (gained through personal contacts with family members, friends, or mechanics) was relied on by one-quarter, as were the recommendations of car dealers. One in nine referred to prominent consumer-oriented publications as a key source.

The leading role played by newspapers can be shown in other findings as well. For example, newspaper advertising was probed by means of a sequence of questions that define unaided and aided recall of aftermarket product ads. It turned out that three out of five (61%) of all PMs recalled newspaper advertising as a source of information they expect to be able to rely on or actually use. (Table 16). And PMs who do more work on their cars themselves show even greater reliance on newspaper advertising. Thus, the most active consumers, the DIYers, are the ones who can be reached most effectively and directly through newspapers.

Table 16: Exposure to Newspaper Replacement Parts Advertising (aided and unaided)

| | Total PMs | Major DIYer | Minor DIYer | Non-DIYer |
|---|---|---|---|---|
| Total look at newspaper parts advertising (aided and unaided) | 61% | 77% | 64% | 44% |
| Use newspaper to compare parts values (unaided) [a] | 31 | 37 | 32 | 25 |
| Look at newspaper parts advertising (aided) [b] | 30 | 40 | 32 | 19 |

Questions: a If you were going to buy tires or other replacement parts and wanted to compare values and prices, where would you expect to find this information?

b Did you look at newspaper ads before you bought any of your last replacement parts?
Do you ever look at any advertising for automotive replacement parts in your newspaper?

Two sections stood out as places readers expect to find advertising of automotive aftermarket products: sports (identified by 29%) and classified (by 22%). The general news section or other sections were mentioned by smaller proportions of car maintainers. But almost one-quarter (23%) of PMs failed to identify any section in particular, which suggests that an effective advertising strategy can be built on placements throughout the paper rather than by an exclusive concentration on any specific section (Table 17).

Table 17: Newspaper Section as a Source of Information on Replacement Parts (Other than Tires)
(based on respondents who named newspapers)

| | Sports | Classified | General news Section | Other[a] | Don't[b] know |
|---|---|---|---|---|---|
| Total: | 29% | 22% | 10% | 16% | 23% |
| Male | 30 | 23 | 10 | 16 | 21 |
| Female | 26 | 19 | 12 | 16 | 27 |
| Region: | | | | | |
| East | 32 | 21 | 10 | 15 | 22 |
| Mid-West | 24 | 26 | 7 | 14 | 29 |
| South | 22 | 25 | 17 | 18 | 18 |
| West | 43 | 13 | 7 | 17 | 20 |
| Number of cars in household: | | | | | |
| One | 35 | 15 | 14 | 16 | 20 |
| Two | 28 | 23 | 11 | 11 | 27 |
| Three + | 21 | 29 | 5 | 24 | 21 |

[a] Includes inserts, financial, and other sections.
[b] Don't know/not sure/none in particular.

Question: In which section of the newspaper would you expect to find most advertising of replacement parts (motor oil, oil filter, spark plugs, battery, muffler, shock absorber)?

Tire Buying: A Special Case

The purchase of replacement tires is a need that every car owner confronts periodically. As the dollar costs of tires exceed those of the other six aftermarket products explored in this survey, several questions on tires were added to enable us to portray buying patterns in somewhat finer detail.

As noted earlier, over one-half (54%) of all sampled PMs had bought tires in the past twelve months. Women comprised 35 percent of all tire-purchasers, only slightly less than their proportional representation among car maintainers in the total sample. Recent buyers of new cars, understandably enough, were less likely to have bought tires, as were PMs in one-car households. By way of contrast, in households with three or more cars, two-thirds of the PMs (66%) had bought replacement tires.[1] And major do-it-yourselfers, who were more likely than other car maintainers to own used cars, were also more likely (60% vs. 50%) to have bought tires in the preceding year. In both cases, greater need led to a higher incidence of tire purchasing. But as we shall see, a perceived need is not necessarily promptly followed by the purchase of tires.

Tire company outlets accounted for more than one-half (53%) of tire purchases by PMs. Three other types of tire-selling establishments were bunched together fairly closely: major department stores (14%), auto supply stores (10%) and gas/service stations (9%). Given the dominant position that tire company outlets had over all others in prior-year sales for these car maintainers, only a few notable demographic differences were observed. For

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[1] Additional details on tire-buying incidence among various demographic groups are shown in Appendix table A.

example, tire company outlets were patronized proportionately more often by:

--PMs living in the West (by 65%);

--PMs who did their own major repairs (by 58%); and

--Recent new car (1982-84 model) buyers (by 61%).

Not surprisingly, the place of purchase was most often the place of installation of replacement tires: just under two-thirds (65%) of tire-buying PMs had them installed there, with self-installation accounting for half of the remainder.[1] Women, buyers over 45, wealthier tire buyers, and non-do-it-yourselfers were all more likely to rely on one-stop tire buying and installation than the average car maintainer who bought tires in the past year (Table 18)[2].

Brand-specifying by tire purchasers actually represents only one element of a complex buying decision. As we saw earlier, tire company outlets were the most heavily patronized of all tire sales establishments. In these cases, buyers are opting for one company's product line rather than another's. Thus, brand awareness, preference, and specifying are often only distinguishable in the abstract: buyers "specify" their brand by their choice of outlet rather than at a later stage in the buying process. The same fusion of tire-outlet choice and brand-specifying occurs when buyers go to major department stores that feature their own line of tires. Asking tire buyers who shop at tire company outlets or department stores about "brand specifying" may yield answers about tire types rather than brands.

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[1]The special character of those eligible to take part in this survey--primary car maintainers under age 65--lowered the incidence of place-of-purchase installation below what it would be for all adult tire buyers.

[2]Details on other tire-buyers who installed them on their own are shown in Appendix table B.

Table 18: How Tires Were Installed[a]

| | Installed where purchased | By self | By other household member or someone else |
|---|---|---|---|
| Total tire purchasers: | 65% | 18% | 17% |
| Sex: | | | |
| Male | 62% | 25% | 13% |
| Female | 73 | 6 | 21 |
| Age: | | | |
| 18-34 | 49 | 33 | 18 |
| 25-44 | 64 | 19 | 17 |
| 45-64 | 74 | 14 | 12 |
| Household income: | | | |
| under $25M | 60 | 20 | 20 |
| over $25M | 70 | 17 | 13 |
| Education: | | | |
| some college + | 71 | 13 | 16 |
| high school grad | 60 | 23 | 17 |
| less than high school grad | 59 | 26 | 15 |
| Do-it-yourself: | | | |
| do major repairs, maintenance | 49 | 36 | 15 |
| do minor repairs, maintenance | 74 | 13 | 13 |
| non do-it-yourselfer | 78 | 2 | 20 |
| New car purchasers (1982-84 models): | 74 | 8 | 18 |

[a] All rows equal 100%; "don't knows" (1%) were excluded.

Question: Was the tire(s) installed at the place where you bought it, was it installed by yourself, by another member of your household, or by someone else?

Nevertheless, when asked directly, exactly one-half of recent tire-buying PMs said they specified a brand. Heightened brand sensitivity is more common among men, higher-income tire buyers, major do-it-yourselfers, and owners of multiple cars[1]. And, confirming our analysis of the link

[1] Details on brand-specifying by tire buyers are shown in Appendix table C.

between the choice of a tire outlet and brand-sensitivity, only 39 percent of those buying at some place other than a tire company outlet or department store specified a brand of tire. Four brands were mentioned with some frequency: Goodyear (by 24%), Michelin and Firestone (by 15% each), and B.F. Goodrich (by 9%).

The time that elapses between one's recognition of a need to buy replacement tires and the actual purchase can be substantial. When PMs who had ever bought tires were asked about this delay, 57 percent said it was less than two weeks and 21 percent said it lasted between two weeks and one month. But more than one-quarter (28%) admitted that the period stretched out beyond one month. Those under age 35 were more inclined to put off their tire purchase longer, as were those who did a lot of work on their cars themselves. But the deferring of purchases for two weeks or even longer was a common pattern among all demographic groups. This suggests that opportunities exist for replacement tire advertising that stresses promptness (with the benefit of added safety) as a theme that can evoke substantial consumer response.

Tire Information Sources: Sales Staff and the Media

In making their tire-buying decisions, consumers have a range of information sources to help them. As was true for other aftermarket products, newspapers emerged as the number one tire-shopping medium, closely followed by tire dealers and by personal contacts (family members, friends, etc.) as other key information sources (Table 19). Older PMs, women, and those with lower incomes were somewhat more likely to rely on other people rather than on newspapers or other print media. Prominent among the latter are the two main consumer-oriented magazines, which are relatively more often used (along

Table 19: Source of Information About Tires[a]
(based on all who identified a source)

| | Newspaper | Tire dealer | Personal[b] contacts | Consumer reports/ consumers union | Yellow pages | Other[c] |
|---|---|---|---|---|---|---|
| Total sample: | 28% | 27% | 19% | 16% | 9% | 16% |
| Sex: | | | | | | |
| Male | 30% | 27% | 17% | 15% | 8% | 18% |
| Female | 24 | 27 | 24 | 18 | 10 | 14 |
| Age: | | | | | | |
| 18-24 | 26 | 26 | 19 | 12 | 13 | 21 |
| 25-34 | 26 | 27 | 18 | 16 | 11 | 16 |
| 35-44 | 30 | 27 | 17 | 16 | 9 | 17 |
| 45-54 | 32 | 28 | 18 | 19 | 8 | 16 |
| 55-64 | 24 | 27 | 27 | 15 | 3 | 14 |
| Household income: | | | | | | |
| under $15M | 25 | 32 | 27 | 7 | 8 | 12 |
| $15M-$24.9M | 28 | 27 | 21 | 13 | 6 | 14 |
| $25M-$34.9M | 30 | 21 | 19 | 19 | 11 | 17 |
| $35M + | 29 | 29 | 13 | 23 | 10 | 20 |
| Education: | | | | | | |
| some college + | 28 | 24 | 19 | 22 | 9 | 16 |
| high school grad | 26 | 30 | 22 | 9 | 10 | 15 |
| less than h.s. grad | 36 | 31 | 14 | 7 | 4 | 21 |
| Region: | | | | | | |
| East | 33 | 24 | 22 | 20 | 5 | 18 |
| Mid-West | 29 | 23 | 20 | 16 | 9 | 16 |
| South | 21 | 31 | 18 | 13 | 13 | 14 |
| West | 30 | 28 | 18 | 15 | 8 | 17 |
| City size: | | | | | | |
| metro | 29 | 25 | 16 | 21 | 9 | 17 |
| suburbs | 33 | 24 | 19 | 17 | 8 | 16 |
| non-metro | 20 | 32 | 23 | 10 | 9 | 15 |
| Do-it-yourself: | | | | | | |
| do major repairs | 31 | 26 | 16 | 13 | 8 | 18 |
| do minor repairs | 29 | 28 | 18 | 17 | 11 | 18 |
| non do-it-yourselfer | 23 | 26 | 24 | 19 | 8 | 12 |

a "Don't knows" omitted; for total primary maintainers sample they equal 13%.
b "Personal contacts" include family, friends, mechanics, etc.
c "Other sources" includes: shop around (7%), magazines (4%), television (1%), radio (1%), and other (2%).

Question: If you were going to buy tires and wanted to compare values and prices, where would you expect to find this information?

with newspapers) by better educated PMs. But a variety of sources of information on tire values and prices were pinpointed by tire buyers in every demographic group; newspapers were usually first or second in order of importance.

Another indicator of the central role newspapers can play in bringing relevant information to the attention of tire purchasers is the fact that they are better than average readers: 73 percent read a paper yesterday, compared with 69 percent of all sampled PMs and 67 percent of adults in general. This means that tire advertising "selects" customers for tires with greater than average efficiency.[1]

Tire buyers give high marks to the sales personnel at their purchase outlets, another key source of information. Two thirds (67%) rated them as "very knowledgeable," and another 25 percent as "somewhat knowledgeable." Older PMs and those with less education were likelier than others to rate sales people very highly, but satisfaction with the service they received was generally shown by tire buyers in all demographic groups. The quality of staff and service at tire dealers or other outlets can be another useful theme in newspaper advertising.

The two newspaper sections in which tire advertising and other consumer information are most often expected to be found are sports (cited by 35%) and classified (cited by 27%). The sports section was pinpointed more often by men, college-educated, and higher-income tire buyers, while classified was identified with relatively greater frequency by downscale consumers . These two are where experience has led tire buyers to expect to find informative advertising. But nearly two-fifths of those mentioning newspapers either

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[1]For other evidence on the selective appeals of newspaper advertising to prime prospects, see "How Newspaper Ads Select Customers" (Newspaper Advertising Bureau, 1980).

failed to specify a section or referred to some other section, which suggests that other opportunities for effective advertising exist in the pages of the daily paper apart from the two most frequently used in the past.

## DO-IT-YOURSELF: A GROWING FORCE IN THE AUTOMOTIVE AFTERMARKET

As we have seen, car-owning Americans are increasingly taking a hand in a wide range of repair and maintenance tasks. This trend toward self-sufficiency, motivated in large part by economic forces (fewer convenient service outlets, rising costs of parts and labor, etc.) and also by the wish to be less dependent on others or by pride in one's own accomplishments, has fed the growth of a "do-it-yourself (DIY) share of the aftermarket that is estimated at around $10 billion. Inflation-driven costs for new and used cars have encouraged people to hold onto cars longer. As a result, the average age of registered cars has risen over the past decade from less than four to more than seven years. Linked to this increased retention of older cars in households, therefore, is the need to find ways to minimize the costs of car care.

### Profile of Do-It-Yourselfers

Our sample of primary car maintainers breaks into three segments of nearly equal size:[1]

--34 percent do some major repairs (13%) or nearly all that needs to be done, e.g. tune-ups, parts installations (21%). These are called the "major do-it-yourselfers" (DIYers) in our analysis.

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[1]The eligibility criteria used in this telephone survey (primary car maintainers, age 18-64) create a slight bias toward do-it-yourself activities. Senior citizens or other drivers in car-owning households would be less likely to take on minor or major DIY tasks. National surveys of car-owning adults generally find somewhat lower levels of hands-on involvement in car care.

--32 percent do minor servicing jobs, such as oil changes or installing anti-freeze. These are the "minor DIYers."

--34 percent admit they do little or no work on their car themselves. These are the "non-DIYers."

Some clear differences exist among PMs in these three groups, seen in terms of their demographic and car-use characteristics. For example, major DIYers are appreciably more likely to be:

- o Men
- o Under age 35
- o Craftsmen or foremen
- o Living in the Mid-West or West
- o Rural (non-metro) residents

By way of contrast, the incidence of non-DIYers is greatest among women, older PMs, the formerly-married, and those employed in white collar or professional-level jobs. (Table 20).

The "need" for car care, as indicated by the number of cars in the household or usage levels, is also linked with do-it-yourself patterns. The more cars per household, the higher the proportion of DIYers. And the cars that DIYers drive are less likely to have automatic transmission, and are likelier to have higher mileage and be driven more miles annually. In all these instances, there is a positive correlation between a greater need for maintenance and the do-it-yourself proclivities of these car-owning PMs. (Table 21).

Table 20: "Do-It-Yourself" Car Care Patterns

| | Major DIYers | Minor DIYers | Non-DIYers |
|---|---|---|---|
| Total PM sample: | 34% | 32% | 34% |
| Sex: | | | |
| Male | 47% | 33% | 20% |
| Female | 13 | 30 | 57 |
| Age: | | | |
| 18-24 | 42 | 44 | 14 |
| 25-34 | 44 | 31 | 25 |
| 35-44 | 31 | 34 | 35 |
| 45-54 | 28 | 32 | 40 |
| 55-64 | 21 | 23 | 56 |
| Household income: | | | |
| under $15M | 39 | 27 | 34 |
| $15M-$24.9M | 33 | 32 | 35 |
| $25M-$34.9M | 38 | 35 | 27 |
| $35M + | 30 | 33 | 37 |
| Education: | | | |
| some college + | 27 | 34 | 39 |
| high school grad | 42 | 29 | 29 |
| less than high school grad | 45 | 31 | 24 |
| Marital status: | | | |
| married | 38 | 32 | 30 |
| divorced, separated, widowed | 24 | 23 | 53 |
| single (never married) | 31 | 39 | 30 |
| Occupation (selected): | | | |
| professional/managerial | 30 | 31 | 39 |
| clerical/sales | 15 | 32 | 53 |
| craftsman/foreman | 63 | 25 | 12 |
| Region: | | | |
| East | 25 | 36 | 39 |
| Mid-West | 39 | 31 | 30 |
| South | 33 | 31 | 36 |
| West | 40 | 31 | 29 |
| City size: | | | |
| metro | 29 | 31 | 40 |
| suburbs | 35 | 31 | 34 |
| non-metro | 38 | 34 | 28 |
| Number of cars in household: | | | |
| one | 25 | 30 | 45 |
| two | 37 | 35 | 28 |
| three + | 46 | 31 | 23 |

Question: Which of these statements best describes the amount of car maintenance and repair work you yourself do?

-- I do little or nothing to the car myself. (Non DIYer)
-- I do minor jobs like change the oil or antifreeze. (Minor DIYer)
-- I do some major jobs like engine tune-ups and repairs. ]- (Major DIYer)
-- I do practically everything that needs to be done.

Table 21: PMs' Car Use Patterns: DIYers and non-DIYers

| (N)= | Major DIYers (406) | Minor DIYers (388) | Non-DIYers (408) | Total PMs (1,202) |
|---|---|---|---|---|
| Number of cars in household: | | | | |
| one | 28% | 35% | 51% | 38% |
| two | 43 | 44 | 34 | 40 |
| three + | 29 | 21 | 15 | 22 |
| Transmission on car used most often : | | | | |
| Automatic | 63% | 70% | 79% | 71% |
| Manual | 37 | 30 | 21 | 29 |
| Number of miles now on car: | | | | |
| Avg. estimated mileage | 63,300 | 51,600 | 43,600 | 52,000 |
| Index | 116 | 99 | 84 | 100 |
| Number of miles driven yearly: | | | | |
| Avg. estimated mileage | 15,900 | 13,900 | 12,300 | 14,100 |
| Index | 113 | 98 | 87 | 100 |

Among DIYers, the reasons given for working on their cars are quite similar, although some differences in emphasis are reflected in the replies of major or minor DIYers. In both groups, two-thirds cited cost-savings ("it's cheaper," "to save money") as the prime reason. But major DIYers mentioned that they can be better assured of the quality of the work done (37 vs. 16%), or that "it's enjoyable" (or "a hobby") more often (20 vs. 12%) than minor DIYers. The latter, by way of contrast, cited "convenience" or "it's simply faster" more often (23 vs. 8%) than the former.

## Car Servicing and Parts Purchasing

Thus, a mixture of economic and personal competence factors support the growth of do-it-yourself car care. Those who can, do; and (it can be inferred) those with a need to do so learn how or are encouraged to try. This pattern may be adversely affected in the future by the growing

complexity of computer-assisted car functions. But countervailing influences --the steady increase in car repair and maintenance costs and fewer convenient service facilities--encourage car owners to seek cost-efficient alternatives. As these market forces are all at work currently, informative advertising that helps do-it-yourselfers to succeed--and car owners in general to seek and find competent help when necessary--can evoke positive responses from aftermarket product consumers. And newspapers offer a highly efficient, hospitable editorial environment for such advertising.

The impacts that do-it-yourself patterns have on various aspects of the auto aftermarket can be seen in a number of other findings of this survey. Non-DIYers, for example, are much more likely to take their car in for check-ups and routine maintenance on a regular basis. DIYers are more likely to wait for the need to become apparent or to do routine servicing themselves. But among those who take their car somewhere for servicing, there is no difference between DIYers and non-DIYers in their loyalty to one favored place of service: nearly three out of four always go to the same place (garage or repair shop, new car dealer, gas station, or other service provider). Finally, DIYers differ substantially from non-DIYers in their gasoline shopping. They are more likely to buy from several stations rather than one, and much more likely to patronize self-service pumps. Here too one can see their buying behavior shaped by a mixture of cost, availability, and self-reliance factors (Table 22).

DIYers also differ markedly from non-DIYers in almost all aspects of aftermarket product consumption. As they are typically responsible for the upkeep of more (and older) cars they are more often faced with the need for replacement parts. Thus, not surprisingly, they are more likely than non-DIYers to buy each of the seven aftermarket products studied, to install

Table 22: Car Servicing and Gas Purchasing

| | Major DIYers | Minor DIYers | Non-DIYers | Total PMs |
|---|---|---|---|---|
| **Car checkups/maintenance** | | | | |
| At regular intervals | 19% | 53% | 71% | 48% |
| Only when something wrong | 35 | 43 | 26 | 35 |
| Do checkups myself (vol.) | 46 | 3 | 3 | 17 |
| | 100% | 100% | 100% | 100% |
| Total (N) = | (406) | (388) | (408) | (1,202) |
| **Servicing: Customer Loyalty** | | | | |
| Always go to same place | 72% | 72% | 76% | 73% |
| Sometimes go to other places | 28 | 28 | 24 | 27 |
| | 100% | 100% | 100% | 100% |
| Subtotal *(N) = | (219) | (377) | (399) | (995) |

* Base: Only those who have their car serviced: excludes those who do checkups themselves and those NA on place of service.

Questions: Do you take your car in for check-ups or routine maintenance at regular intervals, or only when you think something is wrong?

Do you take your car to be serviced at the same place every time or do you sometimes go to another place?

| | | | | |
|---|---|---|---|---|
| **Where gas is bought** | | | | |
| One station usually | 45% | 47% | 53% | 48% |
| Several stations | 55 | 53 | 47 | 52 |
| **Type of gas service preferred** | | | | |
| Self-service | 84% | 71% | 51% | 69% |
| Attendant service | 11 | 21 | 44 | 25 |
| Doesn't matter | 5 | 8 | 5 | 6 |

these parts themselves in almost all cases, and to show heightened brand sensitivity when purchasing the parts[1]. As shown earlier, DIYers also rely more on newspapers when making their buying decisions for aftermarket products.[2]

To sum up, the do-it-yourself segment of consumers of automotive aftermarket products and services is distinctive in its demographic composition, attitudes, and behavior; increasingly important as potential targets of marketing and advertising strategies; and favorably disposed toward newspapers as a key source of consumer information. At present, men account for the largest proportion of do-it-yourselfers. Thus, advertising that employs differentiated themes and appeals of interest both to men DIYers and non-DIYers as well as to women with car maintenance responsibilities can more adequately serve these three major segments of auto aftermarket consumers.

Newspaper advertising can derive added impact by being linked with editorial service features that are an outgrowth of the do-it-yourself phenomenon, as more and more Americans are caught up in it. As they do more (or find it necessary to do more) of the work on the car or around the house themselves, their need for basic information on price, quality, and availability of products locally expands to include knowledge about how to do minor and major repairs and maintenance. Newspapers are uniquely capable of serving both of these categories of information needs through targeted advertising and editorial content coverage, made available periodically to all types of consumers.

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[1] These differences are documented in Appendix Tables A, B, and C.

[2] See table 16, p. 24.

## WOMEN AND CAR CARE

As we have seen, women occupy a place of growing importance in the automotive aftermarket--as car owners or primary maintainers and consequently as consumers of a wide range of car care products and services. In this section of the report, we will highlight some salient differences between women and men PMs that have important implications for the marketing and advertising of aftermarket products to the two groups.

Women comprise 39 percent of our sample of primary car maintainers. Just over one-half (53%) are married, while 27 percent are divorced, widowed or separated, and 20 percent are currently single. The comparable proportions for men are 72, 10, and 18 percent respectively. Thus, women PMs in a near-majority of cases are responsible for the care of their own car; for many of the married women this may also be true, as indicated by the number of cars in the households of these groups of women (Table 23).

Table 23: Number of Cars in Households of Women and Men PMs

| No. of cars in household | Women | | | Men |
|---|---|---|---|---|
| | Married | Single, formerly married | Total | |
| one | 29% | 73% | 50% | 30% |
| two | 48 | 19 | 34 | 45 |
| three+ | 23 | 8 | 16 | 25 |
| | 100% | 100% | 100% | 100% |
| (N) = | (246) | (217) | (463) | (739) |

The marital status of women PMs is strongly correlated with a number of other demographic characteristics. Those who are single are younger and far better-educated than other women; they are somewhat more likely to be working

too. The formerly-married segment of women PMs are appreciably older, with lower incomes and lesser educational attainment than either married or single women PMs. And, linked with these factors of age, income, and sole car ownership, single and married women are more likely than formerly-married women PMs to do at least some car-care tasks themselves (Table 24). Economic pressures that weigh heavily to encourage do-it-yourself car care in general apply to women PMs as well, though to a lesser degree.

Table 24: Demographic and Do-It-Yourself Car Care Patterns Among Women and Men PMS

| | Women | | | | Men |
|---|---|---|---|---|---|
| (N) = | Married (246) | Formerly Married (126) | Single (91) | Total (463) | (739) |
| Age: | | | | | |
| 18-24 | 5% | 3% | 28% | 9% | 13% |
| 25-34 | 33 | 27 | 39 | 32 | 33 |
| 35-44 | 29 | 22 | 14 | 24 | 23 |
| 45-64 | 33 | 48 | 19 | 35 | 31 |
| Education: | | | | | |
| some college+ | 52% | 41% | 77% | 55% | 52% |
| high school grad | 40 | 46 | 20 | 37 | 35 |
| less than high school grad | 8 | 13 | 3 | 8 | 13 |
| Employed: | 61% | 75% | 81% | 69% | 82% |
| Income*: | | | | | |
| under $15M | 11% | 41% | 30% | 22% | 13% |
| $15M - $24.9M | 26 | 37 | 26 | 29 | 20 |
| $25M - $34.9M | 26 | 8 | 22 | 20 | 24 |
| $35M+ | 30 | 10 | 15 | 22 | 33 |
| Do-it-yourself: | | | | | |
| major DIYer | 16% | 12% | 8% | 13% | 48% |
| minor DIYer | 30 | 20 | 44 | 30 | 33 |
| non-DIYer | 54 | 68 | 48 | 57 | 19 |

* Refusals in each group not shown.

The motivation to save money is, if anything, slightly more prominent among women than among men DIYers, even though more men work on their own cars and economizing is also their main stated reason for doing so. Women and men DIYers are alike in their concerns over the quality of repairs or servicing, depending on how extensively members of each group are responsible for such work (Table 25).

Table 25: Reasons for Do-It-Yourself Car Care: Women and Men DIYers

| | Women | | Men | |
|---|---|---|---|---|
| | Minor DIYers | Major DIYers | Minor DIYers | Major DIYers |
| (N) = | (140) | (60) | (248) | (346) |
| Reasons for doing work on car* | | | | |
| Save money, cheaper | 72% | 73% | 65% | 66% |
| Be sure of quality of work | 14 | 32 | 17 | 38 |
| Convenience, get done faster | 25 | 12 | 21 | 20 |
| Enjoyment, as a hobby | 7 | 17 | 15 | 8 |

* Columns add to more than 100%; multiple answers were coded.

Both pressures to economize and self-reliance are reflected in their patterns of gasoline purchasing as well. Women are more likely than men PMs (55 vs. 45%) to buy gas at one station rather than at several, but less likely than men (55 vs. 76%) to prefer to serve themselves. However, women DIYers are similar to men DIYers when it comes to self-service: the more involved they are with car care, the more they prefer to pump their own gas--and to save money by doing so. Economizing and self-reliance motives are also indicated in the way they bring their car in for checkups. Again, as with men, women who are more involved in car care are less dependent on others and less likely to have their car checked and serviced regularly by others. (Table 26). Women DIYers are more likely to patronize a local

garage/repair shop than a new car dealer (43 vs. 24%). With women who are non-DIYers the pattern is the reverse (30 vs. 37%). Gas stations are third in order of importance, being used by one-fifth of women in both groups.

Table 26: Gasoline Purchasing and Servicing of Cars by Women and Men PMs

| | Women | | | Men | | |
|---|---|---|---|---|---|---|
| (N) = | Non-DIYers (263) | Minor DIYers (140) | Major DIYers (60) | Non-DIYers (145) | Minor DIYers (248) | Major DIYers (346) |
| Where gas is bought | | | | | | |
| One station usually | 55% | 50% | 62% | 50% | 45% | 42% |
| Several stations | 45 | 50 | 38 | 50 | 55 | 58 |
| Type of gas service preferred | | | | | | |
| Self-service | 46% | 63% | 78% | 57% | 74% | 85% |
| Attendant service | 50 | 29 | 19 | 31 | 16 | 9 |
| Doesn't matter | 4 | 8 | 3 | 12 | 10 | 6 |
| Car checkups/maintenance | | | | | | |
| At regular intervals | 67% | 60% | 23% | 79% | 50% | 18% |
| Only when something wrong | 30 | 39 | 40 | 21 | 46 | 34 |
| Do check-ups myself (vol.) | 3 | 1 | 39 | -- | 4 | 48 |

Women bought six out of the seven aftermarket products explored in this study slightly less often than men did.[1] Although they buy these products from the same range of outlets, women patronize auto supply stores less often than men do, primarily because they install the parts themselves much less frequently.[2] And, though women who buy parts are less brand-sensitive than men, women who do any work on their cars themselves are significantly more likely than non-DIY women to specify a brand. (Table 27)[3]

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[1] See Appendix table A for details. Motor oil was the sole exception: almost all PMs bought some within the preceding twelve months.

[2] See table 13, page 20, and Appendix table B.

[3] Mufflers and shock absorbers are not shown because too few women purchased them to permit further analysis.

Table 27: Specifying Brands and Self-Installing of Parts By Women PMs

| | Women* | | |
|---|---|---|---|
| | Non-DIYers | All DIYers | Total |
| Motor Oil | | | |
| % Specified brand | 37 | 62 | 47% |
| % Installed herself | 8 | 52 | 28% |
| (N) | (242) | (190) | (432) |
| Tires | | | |
| % Specified brand | 37 | 49 | 42% |
| % Installed herself | -- | 11 | 6% |
| (N) | (102) | (116) | (218) |
| Battery | | | |
| % Specified brand | 32 | 47 | 40% |
| % Installed herself | 4 | 18 | 10% |
| (N) | (74) | (75) | (149) |
| Spark plug | | | |
| % Specified brand | 17 | 48 | 33% |
| % Installed herself | 1 | 35 | 18% |
| (N) | (131) | (130) | (261) |
| Oil filter | | | |
| % Specified brand | 17 | 37 | 26% |
| % Installed herself | 2 | 41 | 19% |
| (N) | (224) | (162) | (386) |

* Bases for each product (N): women who purchased them in the past twelve months.

The information sources women mainly rely on when shopping for aftermarket products are personal contacts (30%), car dealers (24%), and newspapers (23%). Newspapers are relatively more important for women DIYers than for those who depend on others to service their cars. But both groups of women are better than average readers of the daily and Sunday newspapers. Among non-DIYers, 74 percent read a daily and 73 percent a Sunday paper; among women DIYers, 71 percent read a daily and 70 percent a Sunday. By way of contrast, the average adult readership of newspapers, daily and Sunday, is 67 percent.

Women PMs: A Concluding Note

This analysis has documented some ways in which women car maintainers differ from men in their buying behavior, and also how their participation as consumers in the auto aftermarket is affected by their ability to engage in repair or maintenance work on their own cars--as many now do, at least to some degree.

Their greater dependence on others--family members, friends, dealers--for advice on what to buy and for installation of the products they buy creates special opportunities for targeted advertising that is specifically oriented to women's needs. As a group with primary responsibility for car care, they are cost-conscious, more loyal customers of sales and service outlets that have done good work in the past, and likelier to bring their cars to such outlets regularly for needed parts and labor.

These differences suggest the value of devising and implementing marketing strategies that are tailored to women customers of auto aftermarket products and services. For the majority who rely on others, the convenience of one-stop buying and installation can be a dominant theme, with economy and satisfactory service as strong secondary themes. For women who are do-it-yourselfers, the shopping convenience of sales outlets, staffed by people who can give advice on car care when needed, and the low cost and high quality of products are among the advertising themes best suited to their car-maintenance needs.

For both groups of women consumers, the newspaper offers an efficient means of reaching them with information that is timely, in a print advertising context highly familiar to them, one that they rely on as cost-conscious shoppers for a wide range of products.

## WARRANTY AND SERVICE PROTECTION PLANS

To complement the survey's coverage of automotive aftermarket topics, information was gathered on cars owned by primary maintainers, their auto purchase intentions, and the relative importance of warranty and extended service protection plans in their car-buying decisions. This section of the report will review the findings on these topics, focusing in particular on recent or prospective new car buyers.

### Car Ownership

A majority (62%) of primary car maintainers live in households with more than one car available. Of these, 40 percent live in two-car, 16 percent in three-car, and 6 percent in four-plus car-owning households. Just over one-half (53%) of these cars were bought new, a proportion that applies equally to cars in households with only one and more than one car. New cars were more prevalent among upscale car owners, those most able to afford the larger initial investment. But both the sheer number of cars owned by PMs and the substantial proportion bought as used cars materially affect the desire of PMs in every income category to economize when buying auto aftermarket products and services.

Four out of five (79%) cars owned by PMs were identified as American-made. Among the imports, Toyota, Datsun (Nissan), and Volkswagen were favored: these three makes jointly accounted for nearly three-fifths (58%) of all identified foreign cars. Ownership of imports was more prevalent among PMs earning $35,000-plus, the college-educated, and those living in the West. But only one PM in ten lived in a household with only

one or more imported makes, compared with 69 percent who had access only to American-made cars. In the remaining one-fifth of households, both American-made and imported cars were present. As we shall see, the makes owned currently have a bearing on PMs' future car-buying intentions.

Car-Buying Intentions

When interviewed (early in 1984), 28 percent of this PM sample said they planned "to buy another car within the next twelve months." They were asked some other questions about their purchase intentions, and their answers showed the strong influence of economic factors (as well as current car ownership) on the kind of cars they intended to buy. For example, a purchase of a new car is projected by three-fifths (60%) of those planning to buy. But among those who only own cars initially bought new (or a mix of new and used cars), this proportion is significantly greater. A key to understanding this relationship is the correlation of income with car purchase intentions: those earning $35,000-plus are almost twice as likely as those earning less than $15,000 (74 vs. 40%) to be planning to buy a new car. And major do-it-yourselfers are significantly less likely to be thinking of a new car. As we saw earlier, they are drawn primarily from low or moderate income groups. Finally, the link between income and age is implicated in the significantly stronger intentions of those over age 45 (who earn more) to buy a new car (Table 28).[1]

Income, age, and current car ownership are also linked with the intention to buy an American-made vs. an imported car. Younger PMs who plan

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[1] Comparisons among subgroups in this table are substantially affected by their sizes, given that only 28 percent of all PMs indicated an intention to buy a car.

Table 28: Car Buying Plans

| | New or Used?** | | American or Foreign?** | |
|---|---|---|---|---|
| | New | Used | American | Foreign |
| Total PMs planning to buy* | 60% | 33% | 73% | 21% |
| Men | 58 | 36 | 75 | 22 |
| Women | 65 | 28 | 69 | 20 |
| Age | | | | |
| 18-34 | 59 | 36 | 66 | 27 |
| 35-44 | 49 | 44 | 72 | 19 |
| 45-64 | 73 | 18 | 83 | 12 |
| Income | | | | |
| under $15M | 40 | 56 | 85 | 6 |
| $15-$24.9 M | 57 | 33 | 72 | 17 |
| $25-$34.9M | 60 | 32 | 79 | 16 |
| $35M+ | 74 | 24 | 63 | 34 |
| Do-it-yourself | | | | |
| Major DIYer | 49 | 45 | 81 | 16 |
| Minor DIYer | 63 | 28 | 70 | 27 |
| Non-DIYer | 70 | 26 | 67 | 19 |
| No. of cars in household | | | | |
| one | 56 | 35 | 69 | 22 |
| two | 62 | 33 | 75 | 20 |
| three+ | 65 | 32 | 75 | 19 |
| Car(s) owned currently*** | | | | |
| New car(s) only | 88 | 12 | -- | -- |
| Used car(s) only | 41 | 59 | -- | -- |
| Both new and used | 70 | 30 | -- | -- |
| Domestic car(s) only | -- | -- | 86 | 14 |
| Foreign car(s) only | -- | -- | 56 | 44 |
| Both domestic and foreign | -- | -- | 53 | 47 |

---

* Base for both questions: PMs planning to buy a car in next 12 months (N=332).

** Those who were "not sure" are not shown.

*** Those who were "not sure" were excluded from the base.

to buy a car are more strongly oriented to imported makes, as are those with incomes over $35,000. These two groups may well be looking at cars in different price classes, however, since those under age 35 typically earn less than older PMs. But the strongest link exists between the cars now owned and the make one intends to buy. The minority planning to buy a car who already own an import are, as a group, the ones most favorably disposed to buying another foreign car in the future (Table 28).[1]

These findings on car-buying intentions show that affordability and past experience with cars heavily condition the preferences of potential car buyers, once the need for another car (addition or replacement) is acknowledged. These two remain influential in guiding subsequent consumer choices among aftermarket products and services, along with tne elements of self-reliance and economic necessity that, as we saw earlier, underlie the growing do-it-yourself phenomenon.

Warranty Coverage and Service Protection Plans

Nearly two-thirds (65%) of all sampled PMs had ever bought a new car; 26 percent had bought a new car more recently, i.e. the past three (1982-84) model years. Demographic differences between all PMs and those who had ever bought new cars are negligible.

PMs in general, as we saw earlier, are above average readers of daily and Sunday newspapers. Those who had ever bought a new car are appreciably

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[1]Purchase intentions of prospective car buyers at the end of 1984 were quite similar to these, as shown in a Dun & Bradstreet survey of over 500,000 prospects reported in a "M.I.N. Research Alert" newsletter (Dec. 14, 1984, p. 8). Of prospects owning only foreign cars, 51 percent favored an American make; of those owning only American cars, 85 percent planned to buy one; and among those owning both American and imported cars, 63 percent said they intended to buy an American car.

more devoted readers: 77 percent read a daily yesterday and 78 percent read a Sunday paper in the preceding week, compared with an average readership of 67 percent daily and Sunday.

New car purchasers were asked a series of questions about warranty coverage for the last new car they had bought. Eight of nine (89%) confirmed that it had been covered by a manufacturer's warranty plan. Among more recent (1982-84 model) new car buyers, 94 percent said a warranty had been in force. But the details of coverage were less sharply etched in their memory: less than one-half (47%) recalled any of the details. Men were appreciably more likely to remember specific details of coverage than women, and (as expected) those who had bought a new car most recently were more mindful of specific aspects of their plan's coverage. But no important differences existed among those who did recall anything about their plan's coverage: the three elements of warranty plans that were identified with some consistency were the time, the mileage, and major parts coverage. (Table 29).

Buyers of warrantied new cars were asked whether they had also been offered an optional extended service protection plan at the time of purchase. Almost three in five (59%) said that they had: men PMs were more likely than female PMs to recall such an offer. Recent (1982-84 model) new car buyers were significantly more likely to have been offered extended coverage: 70 percent recalled getting an offer at the time of purchase. But their memories of specific details of extended service protection plans were not sharply defined. Slightly more than one-third (36%) of PMs offered the chance to purchase coverage under such a plan actually remembered any of its details. (Table 30).

Table 29: Warranty Coverage Recalled by New Car Buyers, by Sex and Recent Buyers (1982-84 Models)

| | New Car Buyers | | | 1982-84 Model Buyers |
|---|---|---|---|---|
| | Total | Men | Women | |
| 1. Was car covered by warranty? % Yes | 89% | 89% | 89% | 94% |
| (N) [a] | (781) | (486) | (295) | (306) |
| 2. Remember any details of coverage? % Yes | 47% | 53% | 36% | 56% |
| (N) [b] | (695) | (432) | (263) | (287) |
| 3. Which details of coverage? [c] | | | | |
| Time Period | 75% | 74% | 77% | 75% |
| Mileage | 71 | 73 | 64 | 70 |
| Major Parts | 12 | 12 | 14 | 15 |
| (N) [d] | (326) | (229) | (95) | (161) |

[a] Base: those who have ever bought a new car.
[b] Base: those covered by warranty.
[c] Time: 12 months; 2 years; 5 years, etc.
Mileage: 12,000 miles; 24,000 miles, etc.
Major parts: covered everything mechanical, except if by nature or accident; engine, etc.
[d] Base: those who remember details.

Questions: When you bought your last new car, was it covered by a manufacturer's warranty plan? Can you remember any details about the warranty plan? What are they?

As with warranties, the two aspects of plan coverage most often recalled were the time period (specified by 56 percent) and mileage (specified by 35 percent). The cost of the optional plan was recalled by almost one-fifth (19%); 16 percent mentioned that the plan "covered almost everything."[1]

[1] Demographic group differences in recall are rendered unreliable by the small numbers of eligible PMs answering this sequence of questions.

Table 30: Extended Service Protection Plan Recalled by New Car Buyers, by Sex and Recent Buyers (1982-84 Models)

| | Total | Men | Women | 1982-84 Model Buyers |
|---|---|---|---|---|
| 1. Were you offered an extended service protection plan? % Yes | 59% | 62% | 53% | 70% |
| (N) [a] | (695) | (432) | (263) | (287) |
| 2. Remember any details of plan? % Yes | 36% | 37% | 34% | 45% |
| (N) [b] | (407) | (268) | (139) | (200) |
| 3. Which details of plan? | | | | |
| Time period | 56% | 61% | 45% | 53% |
| Mileage | 35 | 46 | 12 | 37 |
| Cost | 19 | 22 | 12 | 22 |
| Covered almost everything | 16 | 12 | 25 | 18 |
| (N) [c] | (147) | (99) | (47) | (90) |

[a] Base: those covered by a warranty.
[b] Base: those who were offered an extended protection plan.
[c] Base: those who remember details.

Question: At the time you bought your last new car, were your offered an extended service protection plan that you could buy? Can you remember any details about the plan? What are they?

It is clear from these results that extended service protection plans are not being uniformly offered, even to recent new car buyers. Nor are the specifics of the various plans clearly defined in car buyers' minds. These two conclusions suggest that more aggressive promotion at the point of purchase and more easily understood advertising are needed to establish the realistic market potential of such plans.

Only one-third (34%) of new car buyers offered an optional protection plan that extended their warranty coverage actually bought it. Among those

who found it to be an attractive option were the following groups: women, young PMs (18-24), those with less education or low income, and the unemployed. These groups have been shown in other findings to be among the most cost-conscious in their aftermarket shopping and buying. Here it becomes apparent that this attitude colors evaluations of service protection plans as well. Three closely related reasons were offered by those who did not buy such a plan: lack of any felt need; the option was "too costly"; or it "wasn't worth the money." In effect, the plan's cost-benefit ratio was unfavorable in their eyes (Table 31).

Table 31: Purchase of Extended Service Protection Plan and Reasons for not Purchasing, by Sex and Buyers of 1982-84 Models

| | Total | Men | Women | 1982-84 Model Buyers |
|---|---|---|---|---|
| 1. Did you purchase the extended service protection plan? % Yes | 34% | 31% | 42% | 40% |
| (N) [a] | (407) | (268) | (139) | (200) |
| 2. Why didn't you purchase? | | | | |
| No need/unnecessary | 32% | 31% | 33% | 38% |
| Too expensive | 21 | 21 | 21 | 21 |
| Not worth the money | 19 | 21 | 16 | 20 |
| (N) [b] | (266) | (185) | (81) | (119) |

[a] Base: those who were offered an extended service protection plan.
[b] Base: those who did not purchase the plan.

Recall of recent advertising by manufacturers or dealers of warranty coverage or extended service protection plans available to new car buyers is not extensive among sampled primary maintainers. Only 50 percent said they had "recently read or heard" anything about manufacturers' warranty plans,

and 46 percent acknowledged awareness of ads about "additional service protection plans that new car buyers can purchase." The same groups claimed higher recall of both types of ad messages: men, those with higher income or education, and major do-it-yourselfers.

The Importance of Warranty and Extended Service Protection Plans

To gauge the relative importance of these two plans as influences upon the purchase decisions of new car buyers and others, nine elements that might affect such decisions were tested. "Reliability" and "quality and value" lead the list, rated as "very important" by more than nine out of ten sampled PMs. Four other elements--"performance and handling," "availability of replacement parts," "overall cost of car," and "comfort when driving"--were rated highly by two-thirds or more of the PMs. The two service plans, by way of contrast, were eighth and ninth in order of importance. (Table 32)

Table 32: Importance of Nine Elements* in Car-Buying Decisions

| | Degree of Importance:** | | |
|---|---|---|---|
| | Very important | Somewhat important | Not important |
| Reliability | 94% | 5% | 1% |
| Quality and value | 91 | 8 | 1 |
| Performance and handling | 75 | 22 | 3 |
| Availability of replacement parts | 75 | 21 | 4 |
| Overall cost of car | 70 | 25 | 5 |
| Comfort when driving | 65 | 31 | 4 |
| Economical to operate | 57 | 36 | 7 |
| Warranty coverage | 50 | 38 | 12 |
| Extended service protection plan | 30 | 37 | 33 |

* Base: All PMs for each of the nine elements.
** "No opinions" were excluded from these results: In no case did they exceed 5%.

Question: In general, how important are each of these factors when you are deciding what kind of car to buy--very important, somewhat important, or not important?

A follow-up question on these elements yielded results that reinforce the lesser importance accorded to these two service plans in prospective car buyers' estimations. Each PM was asked to choose the one "most important" factor among those s/he had indicated previously was "very important." By this forced choice among highly-rated elements, "reliability" and "quality and value" retain their place at the top of the list of influential factors. But the "overall cost of the car" rises in importance to third. And once again, the two service plans are at or near the bottom in order of importance, not only among PMs in general but also among prospective or recent new car buyers. (Table 33)

Table 33: The Most Important Element in Car-Buying Decisions

| | Total PMs | New Car Prospects [a] | Recent New Car Buyers [b] |
|---|---|---|---|
| N = | (1202) | (199) | (306) |
| Reliability | 28% | 25% | 32% |
| Quality and value | 20 | 22 | 20 |
| Overall cost of car | 19 | 20 | 15 |
| Performance and handling | 9 | 8 | 12 |
| Economical to operate | 8 | 10 | 5 |
| Comfort when driving | 7 | 9 | 11 |
| Warranty coverage | 3 | 3 | 2 |
| Availability of replacement parts | 3 | 1 | 2 |
| Extended service protection plan | 2 | 2 | 1 |
| | 100% | 100% | 99% |

[a] Base: PMs who intend to buy a new car in the next 12 months.

[b] Base: PMs who bought a recent (1982-84 model) new car.

Analysis of rankings made by different groups of PMs showed that those under the strongest economic pressures--women, low income PMs, the nonemployed--are somewhat likelier to place warranty or service protection plans higher in their scale of values. As we have seen elsewhere, they are the most cost-conscious of all demographic segments, across a range of prospective or actual aftermarket purchases. This suggests the value of a differentiated advertising and sales-promotion strategy, one that stresses the added value of such protection plans to high-status car-buying prospects, and the real cost savings and greater control over future maintenance bills for those most sensitive to such appeals because of limited economic resources.

## Promoting and Advertising Extended Service Protection Plans

The results of these probes suggest the following conclusions:

1. Warranty coverage is nearly universal for new cars, but areas of ambiguity exist in consumers' minds when it comes to the actual terms of coverage, apart from time and mileage limitations.

2. Extended service protection plans are not seen as generally available, nor are their details highly salient. This suggests that, as a relatively new type of consumer service being made available, their full potential has yet to be realized.

3. Only about one-third of PMs offered an optional service protection plan purchase it, which further supports the conclusion that the full market potential of such an option has not yet been established. It is not seen by a large majority of car buyers as either necessary or cost-effective.

4. Given the fact that half or fewer of all PMs acknowledged recent exposure to ad messages or other information about these types of plan

coverage, it is clear that more advertising can play a significant role in building awareness and in enhancing the perceived value of such plans as benefits to the new car buyer.

5. At present (and probably for different reasons), neither warranty coverage nor the availability of extended service protection plans looms large as motivating factors in new-car buying decisions. The people with the greatest economic incentive to protect themselves, however, not only view such plans more favorably but they also are more likely to purchase the latter.

6. All this suggests that cost-benefit considerations need to be addressed explicitly (and in plain language) when communicating with future prospects, rather than the highly detailed "warranty-type" coverage information that is prominent in much current advertising. The plan's basic values for consumers must first be established in their minds before the fine print can assume much importance.

## CONCLUSIONS AND RECOMMENDATIONS

This survey took a fresh look at a key segment of consumers of auto aftermarket products and services: the primary maintainers who are prime prospects because of their demonstrably more active role in car care. What follows are a few general conclusions and recommendations flowing from its findings.

o With the steady decline in the availability of local gas stations (and mechanics), and the growing prominence of self-service installations, car owners are being forced into new patterns of car care. Moreover, changes in the composition of households--particularly the explosive growth of single-person households--have placed added stress on individual self-reliance. These changes have fed the do-it-yourself movement, with its strong appetite for more consumer information about products and techniques of car care.

o The do-it-yourself segment of automotive aftermarket consumers is becoming more diversified: women, older car owners, and higher income car maintainers are increasingly doing some work on their own cars. Advertising that is targeted to their specific needs and preferences will be more cost-effective.

o Women now constitute a sizable and distinctive segment, making decisions that account for a significant share of revenues earned by manufacturers, dealers, and other sales and installation outlets. Advertising campaigns and placements do not yet take adequate account of their growing importance.

o Parts purchasing is a year-round necessity for car maintainers, especially for those in multiple car-owning households. Frequent

advertising in newspapers that takes account of the "thin-market" concept [1] can keep ad sales messages in front of prospects whenever the need for parts replacement or service arises.

o The age of specialization is becoming more evident when it comes to place-of-purchase installation of auto aftermarket products. Sellers need to emphasize not only availability and price but also their special expertise, stressing one-stop buying and installation. The two go together more often than not, especially among women and non-DIYers.

o Sales outlets offering both aftermarket products and services might build greater customer response by stressing the knowledgeability of staff and the convenience of one-stop, integrated car care, rather than placing emphasis on brand-identification in their ad messages.

o Tire-buying often takes place on a deferred basis. A safety-promoting ad campaign, using "low-threat" messages, can encourage laggard consumers to buy replacement tires soon after the need to do so is recognized.

o Newspapers are the prime medium that car maintainers look to for information about car care products and services. Car dealers and other sales and service outlets are natural allies with the local newspaper in meeting people's needs for timely, reliable information. And as this survey has shown, car maintainers--who make most of the decisions about car car--are above average readers of newspapers, both daily and Sunday.

o The convention of placing automotive advertising mainly in the sports and classified sections of the newspaper is challenged by findings of this

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[1] During any given week, only a small proportion of consumers buys a particular product, and the great majority of purchases are not planned as much as seven days ahead. See "How America Shops and Buys" (Newspaper Advertising Bureau, 1983) for an analysis of the concept.

survey that show a substantial proportion of prime prospects lacking firm expectations about where to find automotive advertising. Placing some ads in other sections of the paper (e.g. general news, lifestyle) can get an advertiser's message in front of a larger, more diversified set of prospects. As the responsibility for car maintenance becomes more widely shared, the opportunities to reach potential customers through the newspaper expand to include sections that enjoy substantial reader traffic by groups not previously considered as prime prospects. This widens the scope for creative treatment to take advantage of complementary editorial environments, and for scheduling and positioning of ads based on a clearer, more differentiated perception of target groups of active consumers in the automotive aftermarket.

# #

# APPENDIX

Table A: Purchase of Seven Products in Past Year
(based on total primary maintainers)

| | Motor oil | Oil filter | Spark plugs | Tires | Car battery | Muffler | Shock absorber |
|---|---|---|---|---|---|---|---|
| Total PM sample: | 95% | 89% | 65% | 54% | 37% | 22% | 18% |
| Sex: | | | | | | | |
| Male | 96 | 92 | 69 | 57 | 40 | 24 | 21 |
| Female | 94 | 84 | 57 | 48 | 33 | 18 | 13 |
| Age: | | | | | | | |
| 18-24 | 96 | 88 | 68 | 52 | 38 | 23 | 19 |
| 25-34 | 97 | 89 | 69 | 51 | 31 | 20 | 19 |
| 35-44 | 94 | 91 | 67 | 57 | 38 | 20 | 16 |
| 45-54 | 97 | 91 | 63 | 59 | 39 | 24 | 22 |
| 55-64 | 93 | 86 | 54 | 50 | 45 | 25 | 13 |
| Household income: | | | | | | | |
| under $15M | 97 | 85 | 64 | 46 | 38 | 23 | 14 |
| $15M-$24.9M | 95 | 90 | 65 | 57 | 37 | 21 | 18 |
| $25M-$34.9M | 96 | 90 | 68 | 59 | 39 | 20 | 19 |
| $35M + | 95 | 92 | 63 | 53 | 35 | 23 | 18 |
| Education: | | | | | | | |
| some college + | 95 | 89 | 64 | 53 | 36 | 21 | 17 |
| high school grad | 95 | 90 | 64 | 52 | 36 | 22 | 19 |
| less than high school grad | 98 | 87 | 71 | 62 | 45 | 27 | 19 |
| Marital status: | | | | | | | |
| married | 95 | 91 | 67 | 56 | 39 | 24 | 19 |
| divorced, separated, widowed | 97 | 86 | 63 | 49 | 32 | 18 | 12 |
| single (never married) | 93 | 86 | 59 | 49 | 35 | 18 | 18 |
| Employment: | | | | | | | |
| employed | 95 | 90 | 66 | 54 | 36 | 21 | 18 |
| not employed | 96 | 85 | 61 | 53 | 42 | 23 | 16 |
| Occupation (selected): | | | | | | | |
| professional/managerial | 95 | 90 | 68 | 55 | 42 | 20 | 23 |
| clerical/sales | 95 | 90 | 63 | 57 | 42 | 20 | 18 |
| craftsman/foreman | 96 | 93 | 69 | 59 | 36 | 23 | 22 |
| Region: | | | | | | | |
| East | 93 | 84 | 61 | 55 | 31 | 30 | 21 |
| Mid-West | 93 | 90 | 65 | 47 | 38 | 27 | 18 |
| South | 98 | 94 | 66 | 58 | 42 | 17 | 15 |
| West | 96 | 87 | 66 | 55 | 36 | 11 | 18 |
| City size: | | | | | | | |
| metro | 95 | 87 | 63 | 49 | 37 | 19 | 17 |
| suburbs | 96 | 90 | 64 | 55 | 36 | 23 | 19 |
| non-metro | 94 | 91 | 67 | 57 | 39 | 23 | 17 |
| Newspaper readership: | | | | | | | |
| read yesterday | 96 | 90 | 65 | 55 | 38 | 22 | 18 |
| frequent reader (4-5 days) | 95 | 90 | 65 | 54 | 38 | 21 | 17 |
| infrequent reader (0-3 days) | 95 | 87 | 64 | 54 | 36 | 23 | 19 |
| Sunday reader | 96 | 90 | 65 | 53 | 37 | 22 | 17 |
| Do-it-yourself: | | | | | | | |
| do major repairs, maintenance | 97 | 96 | 79 | 60 | 42 | 28 | 23 |
| do minor repairs, maintenance | 96 | 85 | 61 | 54 | 38 | 20 | 18 |
| non do-it-yourselfer | 93 | 86 | 54 | 47 | 32 | 17 | 13 |
| Number of cars in household: | | | | | | | |
| one | 95 | 84 | 58 | 47 | 34 | 21 | 16 |
| two | 95 | 92 | 66 | 53 | 35 | 20 | 16 |
| three + | 97 | 93 | 74 | 66 | 46 | 27 | 25 |
| New car purchasers (1982-84 models): | 90 | 86 | 50 | 36 | 23 | 15 | 13 |

Question: During the past 12 months which of these replacement parts, if any, did you buy?

**Table B: Percent Who Installed the Replacement Part by Themselves**
(based on replacement parts purchasers)

| | Motor oil | Oil filter | Spark plug | Car battery | Shock absorber | Muffler | Tires |
|---|---|---|---|---|---|---|---|
| Total purchasers: | 56% | 51% | 50% | 43% | 37% | 28% | 18% |
| Sex: | | | | | | | |
| Male | 74 | 68 | 66 | 60 | 49 | 34 | 25 |
| Female | 28 | 19 | 18 | 10 | 8 | 16 | 6 |
| Age: | | | | | | | |
| 18-24 | 67 | 61 | 62 | 55 | * | * | 33 |
| 25-34 | 63 | 58 | 58 | 47 | 47 | 31 | 21 |
| 35-44 | 55 | 47 | 45 | 47 | 32 | 31 | 16 |
| 45-54 | 53 | 38 | 41 | 47 | * | 19 | 13 |
| 55-64 | 43 | 50 | 39 | 33 | * | 16 | 14 |
| Household income: | | | | | | | |
| under $15M | 55 | 51 | 46 | 41 | * | 29 | 19 |
| $15M-$24.9M | 54 | 49 | 51 | 37 | 35 | 30 | 21 |
| $25M-$34.9M | 57 | 53 | 56 | 55 | 43 | 22 | 20 |
| $35M + | 58 | 52 | 46 | 40 | 35 | 29 | 15 |
| Education: | | | | | | | |
| some college + | 54 | 46 | 42 | 40 | 31 | 24 | 13 |
| high school grad | 56 | 52 | 56 | 41 | 40 | 30 | 23 |
| less than high school grad | 71 | 68 | 65 | 60 | * | * | 26 |
| Marital status: | | | | | | | |
| married | 61 | 57 | 54 | 50 | 39 | 30 | 18 |
| divorced, separated, widowed | 41 | 32 | 35 | 20 | * | * | 14 |
| single (never married) | 56 | 48 | 47 | 39 | * | 33 | 22 |
| Employment: | | | | | | | |
| employed | 58 | 52 | 52 | 45 | 38 | 29 | 17 |
| not employed | 52 | 45 | 46 | 34 | 32 | 25 | 22 |
| Occupation (selected): | | | | | | | |
| professional/managerial | 54 | 49 | 46 | 43 | * | * | 15 |
| clerical/sales | 31 | 27 | 33 | 27 | * | * | 6 |
| craftsman/foreman | 82 | 80 | 83 | 66 | * | * | 27 |
| Region: | | | | | | | |
| East | 53 | 47 | 41 | 34 | 28 | 23 | 16 |
| Mid-West | 57 | 56 | 52 | 54 | 46 | 27 | 21 |
| South | 54 | 47 | 52 | 39 | 40 | 33 | 19 |
| West | 64 | 53 | 53 | 45 | 35 | * | 17 |
| City size: | | | | | | | |
| metro | 49 | 40 | 41 | 35 | 34 | 12 | 13 |
| suburbs | 58 | 53 | 51 | 47 | 38 | 29 | 18 |
| non-metro | 61 | 57 | 57 | 47 | 39 | 40 | 23 |
| Newspaper readership: | | | | | | | |
| read yesterday | 55 | 50 | 48 | 43 | 36 | 26 | 17 |
| frequent reader (4-5 days) | 54 | 49 | 48 | 43 | 35 | 24 | 18 |
| infrequent reader (0-3 days) | 62 | 55 | 54 | 43 | 39 | 36 | 20 |
| Sunday reader | 55 | 49 | 49 | 43 | 36 | 27 | 18 |
| Do-it-yourself: | | | | | | | |
| do major repairs, maintenance | 89 | 85 | 86 | 73 | 67 | 54 | 36 |
| do minor repairs, maintenance | 68 | 58 | 44 | 38 | 23 | 12 | 13 |
| non do-it-yourselfer | 11 | 5 | 3 | 9 | -- | 2 | 2 |
| Number of cars in household: | | | | | | | |
| one | 46 | 39 | 38 | 29 | 31 | 19 | 14 |
| two | 61 | 57 | 54 | 50 | 38 | 26 | 21 |
| three + | 66 | 56 | 59 | 51 | 42 | 44 | 21 |
| New car purchasers (1982-84 models): | 50 | 45 | 44 | 40 | * | 28 | 8 |

* Number of cases too small for reliability.
-- Less than 1%.

Table C: Specified Brand When Purchasing Aftermarket Products
(based on purchasers of each product)

| | Motor oil | Spark plugs | Tires | Car battery | Shock absorber | Oil filter | Muffler |
|---|---|---|---|---|---|---|---|
| Total Purchasers: | 59% | 52% | 50% | 46% | 42% | 41% | 30% |
| Sex: | | | | | | | |
| Male | 66 | 62 | 54 | 50 | 46 | 50 | 31 |
| Female | 47 | 33 | 42 | 40 | 31 | 26 | 25 |
| Age: | | | | | | | |
| 18-24 | 64 | 58 | 55 | 52 | * | 47 | * |
| 25-34 | 60 | 55 | 52 | 47 | 42 | 44 | 27 |
| 35-44 | 58 | 49 | 47 | 38 | 43 | 40 | 41 |
| 45-54 | 59 | 46 | 50 | 49 | * | 37 | 31 |
| 55-64 | 55 | 52 | 44 | 48 | * | 36 | 19 |
| Household income: | | | | | | | |
| under $15M | 63 | 52 | 44 | 46 | * | 39 | 27 |
| $15M-$24.9M | 58 | 54 | 45 | 45 | 37 | 41 | 27 |
| $25M-$34.9M | 59 | 54 | 48 | 53 | 42 | 44 | 27 |
| $35M + | 59 | 50 | 58 | 43 | 41 | 41 | 34 |
| Education: | | | | | | | |
| some college + | 53 | 45 | 49 | 47 | 37 | 36 | 29 |
| high school grad | 62 | 55 | 49 | 44 | 41 | 45 | 25 |
| less than high school grad | 75 | 70 | 59 | 51 | * | 51 | * |
| Marital status: | | | | | | | |
| married | 62 | 55 | 52 | 47 | 42 | 44 | 33 |
| divorced, separated, widowed | 51 | 44 | 40 | 36 | * | 32 | * |
| single (never married) | 54 | 47 | 50 | 51 | * | 38 | 26 |
| Employment: | | | | | | | |
| employed | 58 | 51 | 50 | 45 | 41 | 40 | 27 |
| not employed | 61 | 55 | 51 | 50 | 46 | 43 | 35 |
| Occupation (selected): | | | | | | | |
| professional/managerial | 56 | 53 | 59 | 56 | * | 44 | * |
| clerical/sales | 46 | 34 | 38 | 40 | * | 23 | * |
| craftsman/foreman | 76 | 74 | 52 | 42 | * | 55 | * |
| Region: | | | | | | | |
| East | 43 | 44 | 43 | 41 | 35 | 33 | 27 |
| Mid-West | 60 | 51 | 54 | 47 | 57 | 43 | 26 |
| South | 66 | 60 | 55 | 49 | 33 | 45 | 35 |
| West | 63 | 48 | 44 | 46 | 44 | 39 | * |
| City size: | | | | | | | |
| metro | 53 | 46 | 43 | 47 | 41 | 34 | 27 |
| suburbs | 57 | 51 | 53 | 50 | 47 | 39 | 33 |
| non-metro | 65 | 58 | 53 | 42 | 37 | 49 | 27 |
| Newspaper readership: | | | | | | | |
| read yesterday | 58 | 52 | 49 | 48 | 44 | 40 | 28 |
| frequent reader (4-5 days) | 58 | 52 | 49 | 48 | 44 | 38 | 29 |
| infrequent reader (0-3 days) | 60 | 53 | 51 | 42 | 38 | 46 | 30 |
| Sunday reader | 58 | 52 | 49 | 46 | 39 | 39 | 28 |
| Do-it-yourself: | | | | | | | |
| do major repairs, maintenance | 80 | 78 | 60 | 55 | 63 | 61 | 39 |
| do minor repairs, maintenance | 62 | 46 | 50 | 47 | 30 | 42 | 26 |
| non do-it-yourselfer | 33 | 19 | 37 | 32 | 18 | 17 | 19 |
| Number of cars in household: | | | | | | | |
| one | 50 | 41 | 47 | 41 | 37 | 33 | 22 |
| two | 62 | 54 | 48 | 48 | 41 | 44 | 30 |
| three + | 68 | 64 | 57 | 49 | 49 | 47 | 37 |
| New car purchasers (1982-84 models): | 55 | 50 | 56 | 47 | * | 37 | 33 |

* Number of cases too small for reliability.

Table D: Characteristics of the Sample

| | Unweighted Number | Weighted Number * |
|---|---|---|
| Total PM sample: | 1202 | 1446 |
| Sex: | | |
| Male | 739 | 887 |
| Female | 463 | 559 |
| Age: | | |
| 18-24 | 131 | 160 |
| 25-34 | 388 | 467 |
| 35-44 | 281 | 337 |
| 45-54 | 181 | 216 |
| 55-64 | 205 | 247 |
| Household income: | | |
| under $15M | 193 | 237 |
| $15M-$24.9M | 280 | 340 |
| $25M-$34.9M | 280 | 338 |
| $35M + | 350 | 413 |
| Education: | | |
| some college + | 630 | 755 |
| high school grad | 434 | 518 |
| less than high school grad | 132 | 165 |
| Marital status: | | |
| married | 778 | 929 |
| divorced, separated, widowed | 195 | 243 |
| single (never married) | 226 | 271 |
| Employment: | | |
| employed | 925 | 1109 |
| not employed | 277 | 337 |
| Occupation (selected): | | |
| professional/managerial | 143 | 172 |
| clerical/sales | 118 | 142 |
| craftsman/foreman | 168 | 204 |
| Region: | | |
| East | 333 | 333 |
| Mid-West | 342 | 383 |
| South | 327 | 448 |
| West | 200 | 282 |
| City size: | | |
| metro | 365 | 437 |
| suburbs | 437 | 521 |
| non-metro | 400 | 488 |
| Newspaper readership: | | |
| read yesterday | 868 | 1033 |
| frequent reader (4-5 days) | 800 | 950 |
| infrequent reader (0-3 days) | 401 | 495 |
| Sunday reader | 871 | 1042 |
| Do-it-yourself: | | |
| do major repairs, maintenance | 406 | 495 |
| do minor repairs, maintenance | 388 | 463 |
| non do-it-yourselfer | 408 | 488 |
| Number of cars in household: | | |
| one | 461 | 547 |
| two | 485 | 584 |
| three + | 256 | 315 |
| New car purchasers (1982-84 models): | 306 | 371 |

* Weighted to the proportion of car-owning households in the four regions of the U.S., based on Gallup surveys.

# THE QUESTIONNAIRE

M[ ] F[ ]

INTERVIEWER'S ID#: _____

TIME STARTED: _____

TIME ENDED: _____

LENGTH: _____

GO# 8436

INTERVIEWER'S NAME: _____

DATE: _____

SPOT: _____

1984 Automotive
Aftermarket Study

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SCREENER FOR ELIGIBILITY: Hello, this is _____ from The Gallup Organization. We are conducting an opinion survey on cars. Does anyone in your household own a car?

1[ ] Yes -- ASK Q. 1a

2[ ] No -- TERMINATE

1a. I would like to talk to the person who usually decides when and where your car is repaired or serviced. Are you that person?

1[ ] Yes -- ASK:

↓

1b. And are you between the ages 18-64?

1[ ] Yes -- ASK Q. 2

2[ ] No -- TERMINATE

2[ ] No -- ASK:

↓

1c. When might I be able to call back and talk with that person?

_____

(SET UP APPOINTMENT DATE)

And is that person between the ages of 18-64?

1[ ] Yes

2[ ] No -- TERMINATE

IMPORTANT: IF TERMINATED, FILL IN SPOT NUMBER

2. How many cars do you and your family now own? (DO NOT INCLUDE LEASED CARS, OR COMPANY CARS.)

1[ ] One
2[ ] Two
3[ ] Three
4[ ] Four or more

ASK Q. 3, 4 & 5 FOR EACH CAR MENTIONED IN Q. 2. CHECK EACH ANSWER BELOW.

(IF TWO OR MORE CARS): Let's begin with the car that you bought most recently.

3. What make and model is your (most recent, next most recent) car (e.g., Chevrolet, Impala)?

| | Q. 3 | | |
|---|---|---|---|
| | 1st Car | 2nd Car | 3rd Car |
| Make: | | | |
| Model: | | | |

4. What model year is it?

| | Q. 4 | | |
|---|---|---|---|
| Model Year | | | |
| 1984 | 1[ ] | 1[ ] | 1[ ] |
| 1983 | 2[ ] | 2[ ] | 2[ ] |
| 1982 | 3[ ] | 3[ ] | 3[ ] |
| 1981 | 4[ ] | 4[ ] | 4[ ] |
| 1980 | 5[ ] | 5[ ] | 5[ ] |
| 1979 or older | 6[ ] | 6[ ] | 6[ ] |
| No second or third car | | 0[ ] | 0[ ] |

5. Was it bought new or used?

| | Q. 5 | | |
|---|---|---|---|
| New | 1[ ] | 1[ ] | 1[ ] |
| Used | 2[ ] | 2[ ] | 2[ ] |

(IF ANY NEW CAR BOUGHT, ASK Q. 6-9)
(IF NO NEW CAR BOUGHT, SKIP TO Q. 12)

6. When you bought your last new car (IN Q. 5) , was it covered by a manufacturer's warranty plan?

1[ ] Yes -- ASK Q. 8
2[ ] No
y[ ] Don't know
— SKIP TO Q. 12

IF "YES", ASK:

7. Can you remember any details about the warranty plan?

1[ ] Yes (ASK): What are they? (DO NOT PROBE: RESPONSE CAN INCLUDE HOW MANY MONTHS, MILEAGE OR PARTS COVERED BY THE WARRANTY, ETC.)

_____

_____

_____

2[ ] No

8. At the time you bought your last new car, were you offered an extended service protection plan that you could buy?

1[ ] Yes -- ASK Q. 9

2[ ] No

y[ ] Don't know

SKIP TO Q. 12

IF "YES", ASK:

9. Can you remember any details about it?

1[ ] Yes (ASK): What are they? (DO NOT PROBE: RESPONSE CAN INCLUDE LENGTH OF TIME, MILEAGE, OR PARTS COVERED BEYOND THE WARRANTY PERIOD, ETC.)

_____

_____

_____

2[ ] No

10. Did you buy it?

1[ ] Yes -- SKIP TO Q. 12

2[ ] No -- ASK Q.11

11. Why not? _____

_____

ASK EVERYONE:

12. Have you recently read or heard anything about manufacturers' warrenties now being offered to new car buyers?

1[ ] Yes
2[ ] No

13. And have you recently read or heard anything about additional or extended service protection plans that new car buyers can purchase?

1[ ] Yes
2[ ] No

14. Do you usually buy gasoline at one specific gas station, or do you buy gas at several stations?

1[ ] Buy gas at one station
2[ ] Buy at several stations

15. Do you prefer to fill the car yourself at a "self-serve" facility, or do you prefer to have it filled by an attendant?

1[ ] Fills car self
2[ ] Prefers attendant
3[ ] Doesn't matter (VOLUNTEERED)
y[ ] No self-service in this area (VOLUNTEERED)

16. Now, thinking only of the car you drive most often:

17. What type of transmission does this car have, automatic or manual?

1[ ] Automatic
2[ ] Manual

18. Approximately how many miles is this car driven in one year? (WRITE IN ANSWER AND CHECK RANGE.)

_____ approximate miles per year

1[ ] Under 5,000
2[ ] 5,000-9,999
3[ ] 10,000-14,999
4[ ] 15,000-19,999
5[ ] 20,000 and over
y[ ] Can't estimate

19. About how many miles are on the car now? (WRITE IN ANSWER AND CHECK RANGE.)

_____ total number of miles

1[ ] Under 20,000
2[ ] 20,000-39,999
3[ ] 40,000-59,999
4[ ] 60,000-79,999
5[ ] 80,000 and over
y[ ] Can't estimate

20. Do you plan to buy another car within the next 12 months?

1[ ] Yes -- ASK Q. 21-23
2[ ] No -- SKIP TO Q. 24

IF "YES" IN Q.20, ASK :

21. Will it probably be a new car or a used car?

1[ ] New
2[ ] Used
y[ ] Not sure

22. What size do you think it will be? That is, will it be a subcompact, a compact, an intermediate, a standard, or a luxury-size car?

1[ ] Subcompact (e.g., Rabbit, Escort, Chevette, Lynx, Firebird, Civic, Alliance)
2[ ] Compact (e.g., Reliant, Skylark, Aries, Citation, Firebird, Camaro, Mustang, Accord, Corolla, Tempo)
3[ ] Intermediate (e.g., Cutlass, Sup/Sedan, Regal Coupe/Sedan, New Yorker, Malibu)
4[ ] Standard (full size) (e.g., Oldsmobile 88/98, Le Sabre/Electra, Grand Marquis)
5[ ] Luxury (e.g., Cadillac, Mercedes, Lincoln, Toronado)
y[ ] Not sure

23. Are you more likely to buy an American, or a foreign car?

1[ ] American make
2[ ] Foreign make
y[ ] Not sure

ASK EVERYONE:

24. In general, how important are each of these factors when you are deciding what kind of car to buy -- very important, somewhat important or not important? READ LIST AND RECORD UNDER Q. 24.)

| | Q. 24 | | | | Q. 25 |
|---|---|---|---|---|---|
| | Very Important | Somewhat Important | Not Important | No Opinion | Most Important |
| a. The overall cost of the car | 1[ ] | 2[ ] | 3[ ] | y[ ] | 1[ ] |
| b. Quality and value | 1[ ] | 2[ ] | 3[ ] | y[ ] | 2[ ] |
| c. Reliability | 1[ ] | 2[ ] | 3[ ] | y[ ] | 3[ ] |
| d. Economical to operate | 1[ ] | 2[ ] | 3[ ] | y[ ] | 4[ ] |
| e. Availability of replacement parts | 1[ ] | 2[ ] | 3[ ] | y[ ] | 5[ ] |
| f. Performance and handling | 1[ ] | 2[ ] | 3[ ] | y[ ] | 6[ ] |
| g. Warranty coverage | 1[ ] | 2[ ] | 3[ ] | y[ ] | 7[ ] |
| h. Comfort when driving | 1[ ] | 2[ ] | 3[ ] | y[ ] | 8[ ] |
| i. Extended service protection plan | 1[ ] | 2[ ] | 3[ ] | y[ ] | 9[ ] |

25. Which one of the factors you told me were very important (REPEAT) is the most important of all? (CODE ONLY ONE UNDER Q. 25. FORCE CHOICE.) _____

26. Which of these statements best describes the amount of car maintenance and repair work you yourself do? (READ AND CHECK ONE ANSWER.)

1[ ] I do little or nothing to the car myself -- SKIP TO Q. 28

2[ ] I do minor jobs like change the oil or anti-freeze

3[ ] I do some major jobs like engine tune-ups and repairs — ASK Q. 27

4[ ] I do practically everything that needs to be done

FOR THOSE WHO WORK ON THEIR CAR, ASK:

27. What are the main reasons why you work on the car yourself? (PROBE): Any other reasons? DO NOT READ LIST.

1[ ] Cheaper/Save money

2[ ] For enjoyment/Hobby

3[ ] More convenient/Faster

4[ ] Sure of quality of work

x[ ] Other: (Please specify) _____

_____

28. Do you take your car in for check-ups or routine maintenance at regular intervals or only when you think something is wrong?

1[ ] Regular intervals

2[ ] Only when think something is wrong

3[ ] Do check-ups myself (VOLUNTEERED) SKIP TO Q. 34

29. Where do you usually have your car serviced? READ LIST.

1[ ] New car dealer

2[ ] Gasoline service station

3[ ] Garage/Repair shop

4[ ] Tire service center

5[ ] Some other place (Please specify): _____

0[ ] Do it myself/Don't take car anywhere (VOLUNTEERED) SKIP TO Q. 34

30. Why do you take your car to that particular place? (DO NOT READ LIST, BUT PROBE FOR REASONS. DO NOT ACCEPT "Convenient," ASK, "Why is it convenient?" PROBE: Anything else?)

1[ ] Good location

2[ ] Better service

3[ ] Less expensive

4[ ] Better value

5[ ] Will guarantee work

6[ ] Like or know personnel

7[ ] Good reputation -- well-known

8[ ] Car is still under warranty

x[ ] Other (Please specify): _____

31. Do you take your car to be serviced to the same place every time, or do you sometimes go to another place?

1[ ] Same place -- SKIP TO Q. 34

2[ ] Another place -- ASK Q. 32 and Q. 33

32. What type of place was that?

1[ ] New car dealer

2[ ] Gasoline service station

3[ ] Garage/Repair shop

4[ ] Tire service center

x[ ] Other (Please specify): _____

33. Why do you take your car to this other place? (DO NOT READ LIST, BUT PROBE FOR REASONS, DO NOT ACCEPT "Convenient," ASK, "Why is it convenient?" PROBE: Anything else?)

1[ ] Emergency repair needed
2[ ] Good location
3[ ] Better service
4[ ] Less expensive
5[ ] Better value
6[ ] Will guarantee work
7[ ] Like or know personnel
8[ ] Good reputation -- well-known
9[ ] Car is still under warranty
x[ ] Other (Please specify): _____

34. During the past 12 months which of these replacement parts, if any, did you buy? (READ LIST OF SEVEN PARTS IN Q. 34 CHECK YES/NO IN EACH COLUMN.)

| Purchased? | Motor Oil | Tires | Spark Plugs | Battery | Muffler | Shocks | Oil Filter |
|---|---|---|---|---|---|---|---|
| Yes | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] |
| No | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] |

35. From what type of place or store did you purchase that/those (PARTS MENTIONED)? FOR EACH PART BOUGHT, CHECK BELOW.

| Where Purchased | Motor Oil | Tires | Spark Plugs | Battery | Muffler | Shocks | Oil Filter |
|---|---|---|---|---|---|---|---|
| a. Gas/Service station | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] |
| b. Garage/Repair shop | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] |
| c. New car dealer | 3[ ] | 3[ ] | 3[ ] | 3[ ] | 3[ ] | 3[ ] | 3[ ] |
| d. Auto supply store* | 4[ ] | 4[ ] | 4[ ] | 4[ ] | 4[ ] | 4[ ] | 4[ ] |
| e. Franchise/ Specialty Store* | 5[ ] | 5[ ] | 5[ ] | 5[ ] | 5[ ] | 5[ ] | 5[ ] |
| f. Hardware store | 6[ ] | 6[ ] | 6[ ] | 6[ ] | 6[ ] | 6[ ] | 6[ ] |
| g. Department store* | 7[ ] | 7[ ] | 7[ ] | 7[ ] | 7[ ] | 7[ ] | 7[ ] |
| h. Tire company outlet* | 8[ ] | 8[ ] | 8[ ] | 8[ ] | 8[ ] | 8[ ] | 8[ ] |
| i. All others (SPECIFY) _____ | 9[ ] | 9[ ] | 9[ ] | 9[ ] | 9[ ] | 9[ ] | 9[ ] |

IF BOUGHT NONE OF THE ABOVE SEVEN PRODUCTS, SKIP TO Q. 40)

36. Was the part installed at the place where you bought it, was it installed by yourself, by another member of your household, or by someone else? (CHECK BELOW.)

| How installed | Motor Oil | Tires | Spark Plugs | Battery | Muffler | Shocks | Oil Filter |
|---|---|---|---|---|---|---|---|
| a. Where purchased | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] |
| b. By yourself | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] |
| c. By other household member | 3[ ] | 3[ ] | 3[ ] | 3[ ] | 3[ ] | 3[ ] | 3[ ] |
| d. By someone else | 4[ ] | 4[ ] | 4[ ] | 4[ ] | 4[ ] | 4[ ] | 4[ ] |

ASK FOR EACH PART BOUGHT IN Q. 34

* Examples of: AUTO SUPPLY STORES: NAPA, Western
FRANCHISE/SPECIALTY STORES: Aamco, Meineke, Midas
DEPARTMENT STORES: K-Mart, Montgomery Ward, Sears
TIRE COMPANY OUTLETS: Firestone, Goodyear, Michelin, Uniroyal

37. Did you specify the brand you wanted when you purchased that/those (PART(S) MENTIONED)? CHECK "YES/NO" IN COLUMN BELOW. IF "NO" FOR ALL PARTS, SKIP TO Q. 40.

| Specified Brand | Motor Oil | Tires | Spark Plugs | Battery | Muffler | Shocks | Oil Filter |
|---|---|---|---|---|---|---|---|
| 1[ ] Yes | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] | 1[ ] |
| 2[ ] No | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] | 2[ ] |

38. IF BRAND SPECIFIED "YES" IN Q. 37, ASK: What brand did you specify? RECORD BELOW.

Motor Oil: _____

Tires: _____

Spark Plugs: _____

Battery: _____

Muffler: _____

Muffler: _____

Shocks: _____

Oil Filter: _____

FOR EVERYONE WHO SPECIFIED A BRAND FOR ANY OF THE SEVEN PRODUCTS IN Q. 37, ASK:

39. In general, why do you prefer the brand(s) you specified over other brands? (DO NOT READ LIST, BUT PROBE FOR REASONS: DO NOT ACCEPT "Better," ASK, "Why is it better?" PROBE: Any other reasons?

1[ ] Low price
2[ ] Convenience of outlet where purchased
3[ ] Reputation of outlet
4[ ] Past experience with brand
5[ ] Reputation of brand
6[ ] Recommendation by friend, mechanic
7[ ] Advertised specials, bargain brands, coupons
x[ ] Other (Please specify): _____

_____

ASK EVERYONE:

40. Now I'd like to ask you about the last time you bought a tire(s) for your car(s), whenever that happened to be. About how long after you realized you needed the tire(s) did it take before you actually bought it?

1[ ] Less than 2 weeks
2[ ] 2 weeks to a month
3[ ] 1 up to 2 months
4[ ] 2 months or longer
0[ ] Never bought — SKIP TO Q. 42
y[ ] Don't remember — SKIP TO Q. 42

41. How knowledgeable were the salespeople at the place you bought your tire(s)? Would you say they were: READ

1[ ] Very knowledgeable
2[ ] Somewhat knowledgeable
3[ ] Not at all knowledgeable
y[ ] Don't remember (VOLUNTEERED)

42. If you were going to buy tires and wanted to compare values and prices, where would you expect to find this information? (CHECK ALL SOURCES UNDER Q. 43.)

43. If you were going to buy the other replacement parts we've talked about, such as motor oil, spark plugs, batteries, etc., and wanted to compare values and prices, where would to expect to find this information? (CHECK ALL SOURCES UNDER Q. 43.)

| | Tires Q. 42 | | Other Parts Q. 43 | |
|---|---|---|---|---|
| Newspapers | 1[ ] → | ASK Q. 44 THEN RETURN TO Q. 43 | 1[ ] | -- ASK Q. 45 |
| Magazines | 2[ ] | | 2[ ] | |
| Radio | 3[ ] | | 3[ ] | |
| Television | 4[ ] | | 4[ ] | |
| Yellow pages | 5[ ] | | 5[ ] | |
| Personal contacts (family, mechanics, etc.) | 6[ ] | | 6[ ] | |
| Consumers Report/Consumers Union | 7[ ] | | 7[ ] | |
| Other sources (Please specify): | | | | |
| _____ | x[ ] | | x[ ] | |
| Don't know | y[ ] | | y[ ] | |

MENTIONED NEWSPAPER IN Q. 42 & Q. 43. OTHERS GO TO Q. 46.

44. In which section of the paper would you expect to find most advertising of tires? (READ LIST. CHECK ONE ANSWER. IF "OTHER" SECTION, ASK, "Where?" AND RECORD UNDER Q. 44. THEN RETURN TO Q. 43.)

45. In which section of the paper would you expect to find most advertising of the other replacement parts? (READ LIST. CHECK ONE ANSWER. IF "OTHER" SECTION, ASK, "Where?" AND RECORD UNDER Q.45. THEN SKIP TO Q.47.)

| | Tires Q.44 | Other Parts Q. 45 |
|---|---|---|
| General news section | 1[ ] | 1[ ] |
| Business | 2[ ] | 2[ ] |
| Sports | 3[ ] | 3[ ] |
| Classified | 4[ ] | 4[ ] |
| Other section (Please specify): | | |
| _____ | 5[ ] | 5[ ] |
| Don't know/Not sure/No section in particular (VOLUNTEERED) | y[ ] | y[ ] |
| (RETURN TO Q. 43) | | |

46. Do you ever look at any advertising for automotive replacement parts in your newspaper?

1[ ] Yes
2[ ] No -- SKIP TO Q. 48

47. Did you look at newspaper ads before you bought any of your last replacement parts?

1[ ] Yes
2[ ] No
y[ ] Not sure

ASK EVERYONE:

48. How many days during the last five weekdays -- that is, Monday through Friday, did you look at or read a daily newspaper?

1[ ] One
2[ ] Two
3[ ] Three
4[ ] Four
5[ ] Five
0[ ] None -- SKIP TO Q. 51

49. When was the last time you read or looked at a daily newspaper? (DO NOT READ LIST.)

1[ ] Today -- ASK Q. 50
2[ ] Yesterday
3[ ] Before that
— SKIP TO Q. 51

50. When was the last time before today?

1[ ] Yesterday
2[ ] Before that

51. Did you happen to read or look at a Sunday or weekend edition of a newspaper this past Sunday or weekend?

1[ ] Yes
2[ ] No

Now, I would like to ask you just a few questions for classification purposes, to help us analyze the data.

52. What is your age?

1 1
2 2
3. 3
4 4
5 5
6 6
7
8
9
0

53. What was the last grade or class you completed in school? (DO NOT READ LIST. RECORD BELOW.)

1[ ] Some high school (11 years or less)
2[ ] High school graduate (12 years)
3[ ] Some college (1-3 years college)
4[ ] College graduate or beyond

54. Are you currently employed full-time or part-time, going to school, keeping house, or what?

1[ ] Employed full-time
2[ ] Employed part-time — ASK Q. 55
3[ ] Temporarily unemployed

4[ ] Retired
5[ ] In school — SKIP TO Q. 56
6[ ] Keeping house
x[ ] Other (Please specify):

_____

55. What is your occupation? Please tell me your job title or function and the industry in which you work/

JOB TITLE: _____

INDUSTRY: _____

56. Are you currently:

1[ ] Married
2[ ] Divorced
3[ ] Widowed
4[ ] Separated
5[ ] Or have you never been married? (single)

57. Including yourself, how many adults age 18 or older live in your household?

1 2 3 4 5 6 7 8 9 x[ ] More than 9

58. And how many people in all -- children and adults -- live in your household?

1 2 3 4 5 6 7 8 9 x[ ] More than 9

59. In all, how many licensed drivers live in your household?

1[ ] One
2[ ] Two
3[ ] Three
4[ ] Four or more

60. Was your total family income for 1983 before taxes under $25,000 or was it $25,000 or more?

(IF UNDER $25,000, ASK):
Would that be under or over $15,000?
1[ ] Under $15,000
2[ ] $15,000-$24,999

(IF OVER $25,000 ASK):
Would that be under or over $35,000?
3[ ] $25,000-$34,999
4[ ] $35,000 or more

61. And finally, what is your relationship to the head of this household?

MEN:
1[ ] Male head
2[ ] Husband of head
3[ ] Father of head
4[ ] Son of head
5[ ] Other male

WOMEN:
1[ ] Female head
2[ ] Wife of head
3[ ] Mother of head
4[ ] Daughter of head
5[ ] Other female

1[ ] Male
2[ ] Female

CHECK DAY OF WEEK INTERVIEW WAS COMPLETED:

2[ ] Tuesday 3[ ] Wednesday 4[ ] Thursday 5[ ] Friday 6[ ]Saturday

CIRCLE NUMBER OF CALL ON WHICH THIS INTERVIEW WAS COMPLETED:

1 2 3

SPOT NUMBER:

| | | |
|---|---|---|
| | | |

I hereby attest that this is a true and honest interview.

_____

(Interviewer's Signature)